



March 2021

Arts and the Economy

The Economic and Social Impact of the Arts
in San Francisco

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Introduction

San Francisco is one of the great centers for art in the United States. Few places boast a similar concentration of world-leading arts organizations, and few have a comparably deep community of creative artists and performers. The city's diversity embraces iconic institutions, but also a rich array of smaller organizations that are deeply connected to their communities and contribute to the unique character of the city and the region.

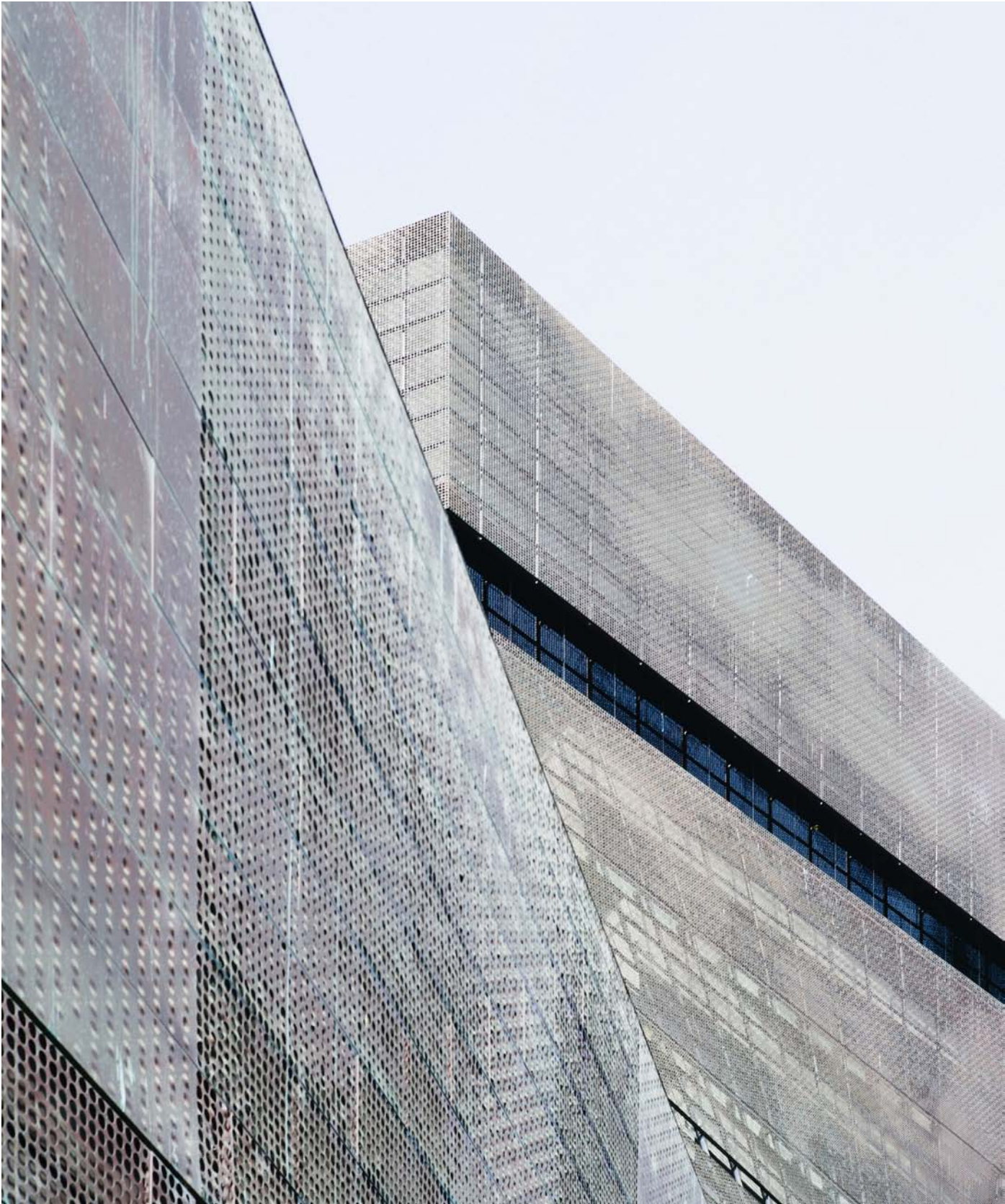
Arts and cultural organizations are usually viewed in terms of their aesthetics and the opportunities they provide residents and visitors for both entertainment and personal enrichment. They are also, however, an industry that employs people, purchases goods and services, and supports other businesses that rely on their presence, particularly in the districts and neighborhoods where they are located. The best-known draw tourists to the city, and nearly all are deeply engaged in their communities through educational activity that extends their programs beyond their walls, particularly into public schools.

This report assesses the economic contributions of the arts in San Francisco, spanning museums, the

performing arts, and cultural organizations, including small organizations as well as large ones. It does not address the vast array of for-profit arts and cultural organizations that also support the economy, but focuses instead on organizations and institutions that are supported by the City, either directly through the San Francisco War Memorial & Performing Arts Center or as grantees of the San Francisco Arts Commission or Grants for the Arts. In the aggregate, these organizations are both cultural assets and economic drivers that due to their nonprofit nature need and receive public support.

This report also assesses how arts organizations have been impacted by, and are responding to, the economic shutdowns caused by the current pandemic, and broader but important topics such as the significance of the arts for technology and creative industries. Issues not fully addressed in this report, which lend themselves to further analysis, include how the benefits of investment in the arts are distributed within communities, their ability to impact social equity, and their potential to support broader economic development.







Measuring the Economic Impact of the Arts

The data used in this study was provided by San Francisco Grants for the Arts (GFTA), the San Francisco Arts Commission (SFAC), and the San Francisco War Memorial & Performing Arts Center (WM), for grants covering fiscal years 2017–2021. The data focuses on nonprofit arts and cultural organizations in the City and County of San Francisco and includes information regarding annual expenditures, employment, number of events, event attendees, and more. Due to the COVID-19 global pandemic and subsequent recession, which upended program attendance and spending during 2020, this study focuses primarily on fiscal years 2017–2019.

The IMPLAN Model Explained

This study utilizes the IMPLAN modeling system to make estimations of economic impacts for the City and County of San Francisco. The IMPLAN input-output modeling system examines the value of a sector or group of sectors within a region at their current levels of production. These impacts can be wide-ranging, as the business activity generated within a sector creates ripples across multiple industries, engages supplier businesses, and produces household income and

spending in the local economy. Impacts measured through IMPLAN include annual operating expenses of organizations supported through grant awards, employment at these organizations, and event-related visitor spending.

Where the IMPLAN model is used, economic impacts are described as either direct, indirect, or induced effects.

- **Direct:** Capturing effects from the original expenditure (e.g., an Opera patron’s purchase of a meal in Hayes Valley or a theater company’s employment of a set designer)
- **Indirect:** Spending related to the provision of the original expenditure (e.g., the restaurant purchases its fish from a local fisherman or the designer contracts with a local artist)
- **Induced:** Stemming from the wages supported by the expenditure (e.g., a waiter or artist spends locally on rent, healthcare, transportation, etc.)

These three types of impacts allow the model to track the multiplying effects as a dollar cycles through the local economy. For this analysis, the local economy is San Francisco.

To capture the complete economic picture, the direct, indirect, and induced impacts are broken out by four economic indicators:

- **Employment:** The total number of jobs generated and supported
- **Labor Income:** The total value of all forms of employment income including employee compensation and proprietor income
- **Value Added:** The contribution to gross domestic product (GDP), through the cost of its intermediate inputs
- **Output:** The total value of a sector's production or GDP

This economic modeling for this study is broken up into multiple parts: the economic impacts of the arts organizations themselves (through their annual operating expenditures and employment numbers), visitors attending arts-related events and venues (through spending on restaurants, lodging, and other items), and visitor-related spending to the War Memorial.

To determine the total economic impacts of the nonprofit arts in San Francisco, the results from each of these two categories are summed together to create the total impact. In addition to the impacts from the IMPLAN model, nonprofit arts and cultural organizations also generate economic impacts through in-kind contributions, education, and community benefits, which are not included in the number presented herein.

Grants Provided to Nonprofit Arts and Cultural Organizations

Grants for the Arts and the San Francisco Arts Commission support the arts in San Francisco by providing grants to nonprofit arts and cultural organizations, as well as individual artists. Applicants can apply for grants from both entities, and several organizations do receive funding from both the SFAC and GFTA.

Grants for the Arts, a division of the City and County of San Francisco's Office of the City Administrator, provides annual funding to the arts through six grant programs. The six grant programs include General Operating Support: Arts; General Operating Support: Parades and Festivals; Grantee Services; Re-Granting; Special Projects and Unexpected Needs; and the Voluntary Arts Contribution Fund. These programs offer unrestricted supporting grants to 501(c)(3) nonprofit arts and cultural organizations physically based in San Francisco with a minimum annual budget of \$20,000. The grant awards are provided through annual funding derived from the City's hotel tax. GFTA determines the grant amount

though a percentage of the three-year average of an organization's operating budget.

The San Francisco Arts Commission supports San Francisco-based artists, organizations, and historically underserved neighborhoods via the Cultural Equity Endowment Fund. There are currently 10 different grant categories¹ available. Unlike GFTA, the SFAC also supports individual artists with grant amounts up to \$20,000 annually. Grant recipients must use the funds to cover an entire project or support a larger project in the city. These commissioned projects span the city's neighborhoods and are required to take place during the fiscal year (July–June) during which the grant was received, and each project must have an event that is open to the public.

During fiscal year 2019 (July 2018–June 2019), GFTA and SFAC granted \$15.3 million dollars to 252 organizations and 90 individual artists in San Francisco. Grants awarded from GFTA averaged just shy of \$42,000 per organization. However, some organizations were awarded significantly more.

Annual Expenditures by Arts Organizations

The \$15.3 million in grants awarded by GFTA and SFAC supported nearly \$600 million in annual expenditures at recipient organizations in fiscal year 2019. These annual expenditures go toward salaries, benefits, and other compensation for employees, funding for art and cultural events, operational expenses such as facility rental, funding for educational programs and workshops, and more.

The five-year² average of \$579 million in total annual expenditures is utilized to measure the arts sector contribution to the San Francisco economy calculated in the following sections. This figure also captures the impacts from the direct employment in the nonprofit arts sector, as labor expenses are included in operational expenditures.

Employment in the Arts

Nonprofit arts and cultural organizations are employers themselves. These organizations employ not only artists and performers, but also hire administrative and financial staff, marketing experts, production support and employees in a wide spectrum of other occupations to support their operations. That can include stagehands, ushers and box office staff in theaters, and maintenance staff in museums. Through this employment, the arts provide a direct economic impact by generating household income that circulates through the San Francisco economy.

GFTA and the SFAC organizational and individual grants directly supported 29,473 total jobs³ in San Francisco in FY 2019. This breaks down to 7,506 employees, 8,237 independent contractors, and 13,495 individual artists. In addition to its 129 City employees and 106 “as-needed” employees, the War Memorial directly supports 7,650 of the jobs included in the total above.

For purposes of the economic modeling, only full-time equivalent employees are utilized as their wages and spending are more certain when compared to independent contractors and artists receiving grants. Therefore, the direct employment modeled is 7,635 employees, which includes the 7,506 employees from GFTA supported organizations and the 129 City employees at the War Memorial.

29,473

Jobs Directly Connected to the Arts

Impacts from Annual Expenditures and Employment

Annual expenditures of \$579 million support 7,635 full-time equivalent employees, an additional 2,021 indirect and induced jobs, and \$365 million in indirect

and induced economic output. In total, nonprofit arts organizations generated \$945 million in economic output, which supported 9,657 jobs in San Francisco in FY 2019.

Nonprofit Arts Industry Contribution (\$ Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	7,635	\$305.3	\$378.7	\$579.7
Indirect	1,416	\$117.7	\$165.1	\$229.5
Induced	605	\$54.2	\$97.7	\$135.9
Total	9,657	\$477.2	\$641.5	\$945.1

Attendance at Nonprofit Arts and Cultural Events

Every year visitors from outside San Francisco and around the world attend art and cultural events in San Francisco such as the San Francisco Ballet, exhibits at the Museum of Modern Art, or parades such as Pride or Carnival in the Mission District. This activity generates a significant amount of event-related spending. For example, attendees may visit bars, purchase food at restaurants, pay for parking or transportation, stay at a hotel or Airbnb, and shop in local stores.

Attendance at arts and cultural events in other cities provides a point of comparison for economic impacts.

One measure is how many visitors come from the surrounding metropolitan area (bringing new dollars into the city) rather than from within the city itself. From this perspective, New York and Boston correlate most closely because of their size in relation to the overall metro area. For example, with San Francisco being relatively small in comparison to the Bay Area—19% of the region’s population—higher portions of arts visitors are likely to come from outside of the city. Globally recognized events also draw broader audiences.

The chart below depicts arts attendance percentages by city/county in comparable locations.

Comparable Cities’ Arts Attendance Surveys

	Chicago	New York	Boston	Seattle/King	Los Angeles
City/County Residents	39%	54%	23%	69%	56%
Metro Area/State	N/A	25%	57%	19%	19%
Outside Metro/State	61%*	21%	20%	12%	25%
% of Metro Population in City	28%	35%	15%	56%	30%

*Chicago reports only resident versus non-resident attendance in its arts study

An Americans for the Arts⁴ analysis also estimated that 40.8% of arts attendees were San Francisco residents and 59.2% were non-residents. This study applies these same ratios for organizations and events studied here.

According to War Memorial and GFTA data, nonprofit arts and cultural organizations hosted 16,551 events over the course of the 2019 fiscal year, attracting 10.9 million attendees. Data was provided by organizations,

and each organization was categorized by the type of arts events they host or support. These categories were drawn from 10 more specific categories used to catalogue each grantee in Grants for the Arts annual reports:

1. Festivals, Parades, and Civic Events
2. Performing Arts
3. Visual Arts

Description of Arts Categories based on GFTA Annual Reports

Festivals, Parades, and Civic Events	Performing Arts	Visual Arts
Celebrations/Parades	Dance	Museums/Visual Arts
Civic Events	Literary Arts	
Cultural Centers	Multi-Arts	
Media	Music	
	Theatre	

The table below shows the breakdown of attendance for each of type of event for the 2019 fiscal year, based on

40.8% attendance from city residents and the remainder from non-residents.

Nonprofit Arts and Cultural Events Attendees

Type of Event	Residents	Non-Residents	Total Attendance
Performing Arts	2,920,240	4,300,453	7,264,279
Visual Arts	979,012	1,441,730	2,435,354
Festivals, Parades, and Civic Events	480,868	708,143	1,196,188
	4,380,120	6,450,326	10,895,821

How Is Visitor Spending Calculated?

To calculate event-related spending estimates for residents and visitors, this study refers to the 2015 Americans for the Arts San Francisco report to serve as an initial estimate for average spending. After adjusting for inflation, the average spending by

residents and non-residents is \$27.01 and \$60.75, respectively. These estimates are used for spending in the Visual Arts category, such as visits to the various museums around the city. The breakdown of this spending is detailed below.

San Francisco Visitor Spending on Visual Arts

2020 Inflated Dollars	SF Resident	Non-Resident
Meals and Refreshments	18.57	29.69
Souvenirs and Gifts	2.06	4.01
Ground Transportation	4.03	9.49
Overnight Lodging	0.66	13.65
Other/Miscellaneous	1.69	3.90
	27.01	60.75

To estimate visitor spending at festivals, parades, and civic events, we use data points from peer cities (including analyses of arts programs in Los Angeles, Chicago, and Seattle/King County), which reflect higher numbers for visitor spending than the Americans for the Arts study. We also assume that higher values are warranted for these types of celebrations given that they often occur over multiple consecutive days, resulting in higher levels of overall visitor spending.

On average, \$78 per person per event is spent in similar cities by non-residents. After adjusting these values for inflation, this results in \$91 per person per event. We make similar adjustments in resident spending to arrive at estimates of spending by visitors on festivals, parades, and civic events.

San Francisco Visitor Spending on Festivals, Parades and Civic Events

2020 Inflated Dollars	SF Resident	Non-Resident
Meals and Refreshments	26.58	44.50
Souvenirs and Gifts	2.95	6.01
Ground Transportation	5.77	14.23
Overnight Lodging	0.95	20.46
Other/Miscellaneous	2.42	5.85
	38.67	91.05

Lastly, for all performing arts events through nonprofit arts and cultural organizations, excluding the War Memorial for which a rate of spending is included in its Spotlight in a later section, we assume a rate of spending between that of visual arts and special events. Thus, we utilize the midpoint of the spending estimates

already calculated to yield spending of \$32.84 for SF residents and \$75.90 for non-residents.

The table below summarizes these calculations and displays the breakdown of visitor-related spending by event type.

Average Visitor Spending by Event Type

Type of Event	Residents	Non-Residents
Festivals, Parades, and Civic Events	\$38.67	\$91.05
Performing Arts	\$32.84	\$75.90
Visual Arts	\$27.01	\$60.75

What is the Total Visitor Spending and Its Economic Impacts?

In 2019, 10.8 million people attended 16,551 nonprofit arts and cultural events in San Francisco, according to data provided by Grants for the Arts. Event-related spending by these attendees totaled \$619.4 million in

direct expenditures in San Francisco, excluding the cost of admission to the event. Of this total amount, \$478.4 million in event-related spending was attributable to visitors to San Francisco.

Nonprofit Arts and Cultural Events Patron Spending by Event Type

Type of Event	Residents	Non-Residents	Total
Festivals, Parades, and Civic Events	\$18,595,149	\$64,476,447	\$83,071,596
Visual Arts	\$26,443,122	\$87,570,654	\$114,013,776
Performing Arts	\$95,900,687	\$326,382,893	\$422,283,580
	\$140,938,958	\$478,429,994	\$619,368,953

The breakdown by sector for how this money was spent by attendees of nonprofit arts organizations and cultural events is aggregated in the table below.

Nonprofit Arts and Cultural Events Spending by Sector

	Residents	Non-Residents	Total
Restaurants/Bars	96,886,140	233,842,638	330,728,778
Retail	10,750,526	31,582,547	42,333,073
Transportation	21,029,202	74,762,267	95,791,470
Lodging	3,453,766	107,512,449	110,966,215
Other	8,819,324	30,730,093	39,549,417
Total	\$140,938,958	\$478,429,994	\$619,368,953

To model economic impact, only the spending of visitors to the city is modeled for its multiplying effects, as this is considered new dollars entering the economy. Expenditures by city residents are assumed to go toward other entertainment in the city in the absence of arts organizations. Of the total \$619.4 million in annual

spending, \$478.4 million is attributable to non-residents. As a result of these direct expenditures, visitor-related spending generated \$655.7 million in total economic output and supported 4,773 full-time equivalent jobs in San Francisco (outside of arts organizations). The detailed breakdown of these impacts is highlighted below.

Economic Impacts of Visitor Spending at Nonprofit Arts Events (\$ Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	3,995.02	\$224.9	\$336.2	\$462.8
Indirect	457.04	\$54.2	\$84.1	\$120.6
Induced	321.29	\$28.7	\$51.9	\$72.3
Total	4,773.35	\$307.7	\$472.2	\$655.7

The hospitality sector (food, beverage, and lodging) greatly benefits in terms of employment from local art events, as noted in the table below. Other industries

such as transportation and retail also reap substantial employment benefits.

**Top 10 Employment Industries
for Nonprofit Arts and Cultural Events Spending Impacts in San Francisco
(Number of Jobs)**

Industry	Direct Employment	Indirect Employment	Induced Employment	Total Employment
All other food and drinking places	751.33	34.75	8.50	794.58
Full-service restaurants	622.37	5.83	16.37	644.56
Limited-service restaurants	553.35	1.82	11.92	567.10
Hotels and motels, including casino hotels	539.10	0.07	0.13	539.31
Transit and ground passenger transportation	210.83	0.95	1.04	212.83
Performing arts companies	198.91	1.81	0.95	201.67
Retail-General merchandise stores	63.79	0.82	4.16	68.77
Management of companies and enterprises	0.00	39.86	1.85	41.71
Other real estate	0.00	31.34	3.59	34.93
Independent artists, writers, and performers	0.00	33.71	0.90	34.61

SPOTLIGHT

San Francisco War Memorial & Performing Arts Center

The San Francisco War Memorial & Performing Arts Center, one of the largest performing arts complexes in the United States, attracts regional, national, and global visitors for performances by world-renowned artists. Located in the historic Civic Center district, the War Memorial is composed of multiple venues that together can seat 7,500 patrons, including the War Memorial Opera House, Davies Symphony Hall, Herbst Theatre, Wilsey Center for Opera, and The Green Room.

Each venue hosts events and performances, most notably by the San Francisco Ballet, San Francisco Symphony, and San Francisco Opera, and the venues are also utilized by numerous local nonprofit arts organizations. The War Memorial offers discounted rental rates for nonprofit organizations, which collectively saves them an average of more than \$1 million⁵ in total expenses in a typical year. This spotlight details the impacts from the War Memorial as a portion of the total impacts found in this study.

Employment Impacts from the War Memorial

The War Memorial employs 129 City employees. This includes administrators, engineers, electricians, security, and custodial staff. It also employs 106 “as-needed” employees who are hired to work the performances and events presented in its venues. These employees generate an economic impact from their employment at the War Memorial through local expenditures, including eating at local restaurants and transportation to and from work.

Using the IMPLAN model, including both the full-time and “as-needed” employees,⁶ by summing 100% of the impacts from full-time employees and 50% of the impacts from “as-needed” employees, the 235 total employees at the War Memorial generate \$11.3 million in indirect and induced economic output and 63 jobs on an annual basis. The table below details these impacts from employment.

War Memorial Employment Impact (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	235	\$9.4	\$11.7	\$17.9
Indirect	44	\$3.6	\$5.1	\$7.1
Induced	19	\$1.7	\$3.0	\$4.2
Total	298	\$14.7	\$19.8	\$29.1

Note: Direct employment includes City Full-Time Employees (FTE) and “As-Needed” employees

War Memorial Resident and Non-resident Licensee Organizations

The War Memorial licenses the use of its venues to organizations and individuals for events and performances throughout the year via contractual agreements. Every entity that utilizes facilities at the War Memorial is categorized as follows.

- **Non-resident Licensees:** Client or organization that engages in a short-term license agreement for use of War Memorial facilities. This includes nonprofit organizations, for-profit organizations, individuals, and other users of the space.
- **Resident Companies:** While they are also licensees, these nonprofit organizations operate solely at the War Memorial based on a 1921 Trust Agreement. The three resident nonprofit companies are the San Francisco Ballet, San Francisco Opera, and San Francisco Symphony.

The following employment sections focus on nonprofit licensees at the War Memorial that are also grant recipients of GFTA. Each licensee organization is separated into resident or non-resident to show their respective employment and economic impacts. The three resident organizations are the San Francisco Ballet, San Francisco Opera and San Francisco Symphony, whereas the 36 other organizations fall under the category of non-resident licensee.

Employment of War Memorial Resident and Non-resident Licensee Organizations

The War Memorial generates employment for resident and non-resident licensee organizations through presenting events and performances in its facilities. These employment figures and impacts are a highlighted portion of the total overall economic impacts of the arts in San Francisco and are not additive.

Similar to the earlier employment impact modeling, only full-time equivalent employees are utilized, as their wages and spending are more certain when compared to independent contractors and artists receiving grants. Therefore, the direct employment modeled is 2,608 total employees, which breaks down to 1,257 employees at the San Francisco Ballet, San Francisco Opera, and San Francisco Symphony, and 1,351 employees for non-resident licensee organizations.

Employment Impacts from War Memorial Resident and Non-resident Licensee Organizations

Using the IMPLAN model, the 2,608 full-time equivalent employees at resident and non-resident licensee organizations of the War Memorial supported an additional 665 indirect and induced jobs, and \$124.8 million in indirect and induced economic output. In total, through the licensee uses of its facilities, the War Memorial generated \$322.8 million in economic output, which supported 3,273 jobs in San Francisco in FY 2019.



Employment Impacts from the Ballet, Symphony, and Opera

Employment Impacts of Resident Organizations (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	1,257	\$50.3	\$62.3	\$95.4
Indirect	207	\$19.4	\$27.2	\$37.8
Induced	100	\$8.9	\$16.1	\$22.4
Total	1,564	\$78.6	\$105.6	\$155.6

Employment Impacts from Non-resident Licensee Organizations

Employment Impacts of Non-Resident Organizations (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	1,351	\$54.0	\$67.0	\$102.6
Indirect	251	\$20.8	\$29.2	\$40.6
Induced	107	\$9.6	\$17.3	\$24.0
Total	1,709	\$84.4	\$113.5	\$167.2

Attendance at Performances and Events at the War Memorial

On average, just over 1 million people attend events at the War Memorial each year—on par with the total number of annual visitors to the Embarcadero’s Exploratorium. To break down the attendance by resident companies versus non-resident licensees, we adjust the 40/60 split used previously for nonprofit arts attendance. We believe these ratios are too

low for the War Memorial, where resident company performances and events account for 76% of average annual attendance. These events draw in crowds from around the region, state, and globe. This study estimates that the attendance ratio for War Memorial events is composed of 30% San Francisco residents and 70% non-residents.

The table below shows the average annual attendance for events at the War Memorial from fiscal years 2017–2019.

War Memorial Event Attendance (2017–2019)

	Avg. Yearly Attendance	Residents	Non-Residents
Ballet	218,585	65,576	153,010
Opera	144,476	43,343	101,133
Symphony	405,917	121,775	284,142
Other Events	203,821	83,159	120,662
Green Room	34,344	14,012	20,331
	1,007,143		

Event-Related Spending at Performances and Events at the War Memorial

Attendees of War Memorial performances and events also spend money in the local economy. Applying the estimates calculated in the previous sections, the average event-related spending at resident company performances and events is \$38.67 for San Francisco

residents and \$91.05 for non-residents. For other performances and events at the War Memorial, estimated spending is \$27.01 for San Francisco residents and \$60.75 for non-residents. The breakdown by sector is as follows.

War Memorial Annual Patron Spending by Sector

	Symphony, Opera, Ballet		Other Events		Total
	Residents	Non-Residents	Residents	Non-Residents	
Restaurants/Bars	6,132,254	23,952,609	1,543,902	3,582,335	35,211,101
Retail	680,685	3,236,217	171,374	565,561	4,653,837
Transportation	1,331,525	7,658,613	335,235	1,338,418	10,663,790
Lodging	218,050	11,015,809	54,898	1,925,121	13,213,877
Other	558,389	3,147,501	140,584	550,057	4,396,531
Total	\$8,920,902	\$49,010,749	\$2,245,993	\$7,961,492	\$68,139,136

The War Memorial has a concentrating effect on visitor spending in the surrounding Civic Center, Mid-Market, and Hayes Valley areas, creating an estimated \$68 million in direct annual expenditures from all event attendees.

Of these, nearly \$57 million are from visitors from outside of San Francisco. This figure is used to estimate the total economic impacts.

Economic Impacts from Event-Related Visitor Spending at Performances and Events at the War Memorial

Visitor spending at War Memorial performances and events has a significant economic impact in the city. When taking into account the multiplier effects of the \$57 million new dollars brought in by visitor

spending, War Memorial patrons generate nearly \$77 million in total economic output annually, while supporting almost 560 full-time equivalent jobs per year.

Economic Impacts of Visitor Spending at War Memorial Events (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	469	\$26.4	\$39.6	\$54.4
Indirect	53	\$6.3	\$9.8	\$14.1
Induced	37	\$3.4	\$6.1	\$8.4
Total	559	\$36.0	\$55.4	\$76.9

Spending related to performances and events at the War Memorial also contributes substantially to the hospitality sector. In particular, the concentration of this output and employment is within the Hayes

Valley, Mid-Market, and Civic Center areas, where the War Memorial is located, and where numerous restaurants and bars are prime locations for War Memorial patrons.

Top 10 Employment Industries for War Memorial Visitor Spending Impacts in San Francisco (Number of Jobs)

Industry	Direct Employment	Indirect Employment	Induced Employment	Total Employment
All other food and drinking places	118.68	5.69	1.36	125.73
Full-service restaurants	98.31	0.92	2.62	101.85
Limited-service restaurants	87.41	0.29	1.91	89.61
Hotels and motels, including casino hotels	88.72	0.01	0.02	88.75
Transit and ground passenger transportation	37.57	0.15	0.17	37.89
Performing arts companies	27.52	0.28	0.15	27.95
Retail-General merchandise stores	10.50	0.13	0.67	11.30
Management of companies and enterprises	0.00	6.34	0.30	6.64
Other real estate	0.00	4.89	0.57	5.46
Independent artists, writers, and performers	0.00	4.73	0.14	4.88

Jobs and Economic Activity Directly Connected to the War Memorial

Of the 29,473 total jobs directly supported by the arts in San Francisco, the War Memorial directly supported 7,650 of these jobs⁷ in FY 2019 through the use of its facilities by resident and non-resident licensees. This included 2,608 full-time employees; 1,880 independent contractors; and 3,162 individual artists.

War Memorial licensees in turn supported an additional 665 full-time equivalent jobs, with War Memorial visitor spending supporting another 559. There were also 129 full-time City employees and 106 "as-needed" employees⁸ working at the War Memorial whose spending supported 63 more full-time equivalent jobs.

Taken together, this represents 4,024 full-time equivalent jobs and 5,148 additional jobs, for a total of 9,172 jobs supported by the War Memorial in San Francisco in FY 2019.

The War Memorial's contribution to economic activity connected to the arts included \$29.1 million from War Memorial employment, \$322.8 million from employment by both resident companies and non-resident licensee organizations, and \$76.9 million in economic output from visitor spending.

In total, the War Memorial was directly connected to \$428.8 million of economic activity in FY 2019.



Total Event-Related Visitor Spending Impacts

The total event-related spending impacts of visitor spending for both the War Memorial and the nonprofit grantees of Grants for the Arts and the San Francisco Arts Commission can be summarized as follows. Non-resident attendees of the War Memorial and the nonprofit arts and cultural events in San Francisco

supported by GFTA and the Arts Commission had \$535 million in direct expenditures in fiscal year 2019. Taking the multiplier effects into account from new dollars spent in the City, event related visitor spending generated \$732.6 million in total economic output, supporting 5,333 jobs in San Francisco.

Total Economic Impacts from Event-Related Spending (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	4,464	\$251.3	\$375.8	\$517.2
Indirect	510	\$60.3	\$93.9	\$134.7
Induced	359	\$32.1	\$58.0	\$80.7
Total	5,333	\$343.7	\$527.7	\$732.6

Total Economic Impact

To determine the total economic impacts of the War Memorial and nonprofit arts organizations supported by GFTA and the Arts Commission, the impacts from employment, annual expenditures, and visitor spending

can be summed together. This does not include the economic and community benefits and impacts generated by these organizations through educational and other community programs.

Impact from Annual Expenditures and Employment

Nonprofit Arts Industry Contribution (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	7,635.00	\$305.3	\$378.7	\$579.7
Indirect	1,416.86	\$117.7	\$165.1	\$229.5
Induced	605.49	\$54.2	\$97.7	\$135.9
Total	9,657.35	\$477.2	\$641.5	\$945.1

Impacts from Event-Related Visitor Spending

Total Economic Impacts from Event-Related Spending (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	4,463.73	\$251.3	\$375.8	\$517.2
Indirect	509.70	\$60.3	\$93.9	\$134.7
Induced	358.78	\$32.1	\$58.0	\$80.7
Total	5,332.21	\$343.7	\$527.7	\$732.6

\$1.7 billion
In Economic Output

Total Economic Impacts

The nonprofit arts constitute a significant industry in the City of San Francisco—one that generates **\$1.7 billion** in economic output and creates or supports **36,828 full-time equivalent jobs** per year.

36,828
Full-Time Equivalent Jobs

Total Economic Impacts of the Arts in San Francisco (\$ in Millions)				
Impact	Employment	Labor Income	Value Added	Output
Direct	34,036.73	\$556.6	\$754.5	\$971.5
Indirect	1,926.56	\$168.0	\$259.0	\$332.4
Induced	964.27	\$86.3	\$155.7	\$258.2
Total	36,827.56	\$810.9	\$1,169.2	\$1,677.1

Return on Investment for the City and County of San Francisco

The City and County of San Francisco supports the arts through budgetary support and grants that help to sustain a wide range of nonprofit arts and cultural organizations within the City, including both city institutions and independent nonprofit organizations. In fiscal year 2019, the City and County of San Francisco spent \$95.7 million⁹ to support the

arts. This includes City grants, operating expenses, facility maintenance, and other investments for the War Memorial (WM), Asian Art Museum (AAM), Arts Commission (ART), Fine Arts Museum (FAMSF), and GFTA. Every million dollars spent by the City on the arts helps to generate \$17.5 million in economic output that supports 385 jobs in San Francisco.

SPOTLIGHT

Proposition E Funding for the Arts

In 2018, San Francisco voters approved Proposition E, which allocates a proportion of the city's existing hotel tax to arts-related programs. Originally created in 1961, the tax was dedicated in part to funding for the arts on the grounds that cultural facilities help to attract tourists. In later years the tax was repeatedly amended to distribute funding to other purposes, and in 2013 the Board of Supervisors removed the allocation to arts programs, redirecting all hotel tax revenues to the General Fund. Proposition E partially restored the original focus of the hotel tax, now set at 14% of hotel revenue, by allocating 8% (\$32 million of \$370 million in 2018) to arts-related city programs including Grants for the Arts and the San Francisco Arts Commission, and to the Mayor's Office of Housing and Community Development to support city-designated cultural districts.¹⁰

A 2020 survey by SF Travel confirmed a strong correlation between tourism and the arts: 29.8% of visitors that stayed overnight, who on average spent \$545, visited museums and 5.9% attended performing arts events; 38.3% of visitors who did not stay overnight, who on average spent \$284, visited museums and 5.3% attended performing arts events. Visitors who said that museums, theaters, and the arts were important to their decision to take a trip, with average daily spending of \$308, also patronized restaurants (64%) and stores (37%).¹¹ SF Travel reports that visitors to the city have a high propensity to return, and that visitors who do return typically move from the iconic and best-known destinations to lesser-known venues and events deeper in the neighborhoods in search of new experiences.¹²





2

Depth and Diversity in the Arts Community

The arts and culture community that underlies these numbers is diverse and multifaceted. This report addresses only part of that community: nonprofit organizations that are directly part of the City of San Francisco (the Fine Arts Museums of San Francisco, the Asian Art Museum, and the Opera, Symphony and Ballet), and nonprofit organizations that have received public support through grants by the city's two grantmaking programs: Grants for the Arts and the San Francisco Arts Commission.

It does not include the city's many independent art galleries, for-profit music venues, performance events at venues such as Oracle Park or the Chase Center, or music festivals such as the Noise Pop Music and Arts Festival (an annual week-long event that features more than 160 bands and 80 events at more than 25 venues), Outside Lands, or Hardly Strictly Bluegrass, which are for-profit or are underwritten by foundations. In 2018 more than 200,000 people attended Outside Lands, the rock concert held each year in Golden Gate Park, where nearly 100 musicians performed over three days and more than 80 culinary partners provided food. Hardly Strictly Bluegrass, supported through an endowment from financier and philanthropist Warren Hellman and

free to the public, also takes place in Golden Gate Park over a three-day period each year. Now in its 19th year, the festival attracts more than 750,000 visitors to performances by more than 80 bands on six stages.¹³

Beyond anchoring San Francisco on the world and national music stage, events of this kind have significant economic impacts. Sixty-five percent of attendees at Outside Lands come from outside San Francisco, bringing revenue to the city. An analysis following the event in 2018 found that the festival supported nearly \$67 million in business in the city between admission fees, ride shares, Airbnb rentals, hotels, restaurants and other services.¹⁴

Remarkable for a city of San Francisco's relatively small size when compared to places like Los Angeles or New York, and for being located on the West Coast, many of the city's arts organizations claim the distinction of being the oldest or largest of their kind in the United States and are nationally and globally recognized for their character and quality. The following case studies, drawn from a longer list of grant recipients from the City of San Francisco in 2019, suggests the depth and diversity of the city's arts community.



A.C.T.

The American Conservatory Theater, with the Geary Theater as home base, is one of the nation's leading regional theaters. With its first season of 16 productions in 1967, A.C.T. became one of San Francisco's first year-round theatrical companies. Since then it has hosted leading actors and numerous world premieres and received a Tony award for theatrical excellence. Adding to more than 1,000 seats in the main theater and multiple studios, in 2015 A.C.T. opened a second facility, the Strand Theater, as a smaller event and performance space in the mid-Market neighborhood.

The largest theater company in the San Francisco Bay Area, A.C.T. employs 750 people each season, from teachers and artists to technicians and administrative staff. Executive Director Jennifer Bielstein notes that "Theater is a very hands-on art form, where it takes hundreds of people such as artists, technicians and other support staff to put on a production." With nine union agreements, the company's unionized employees are well-compensated, which allows them to also work in smaller theaters for less. Over the past five decades more than 400 A.C.T. productions have been seen by more than 7 million playgoers; 150–200 thousand attend events and performances in any given year.

The company sponsors numerous educational initiatives and community partnerships, including a fully accredited Master in Fine Arts (MFA) program; a program where high school students participate in weekly acting classes, attend performances, learn about backstage careers such as theater production and marketing, and write their own original monologues; a high school residency program where students explore the link between theater and social issues most relevant to them; AccessSFUSD: The Arc, a special

education program within the San Francisco Unified School District which offers year-long classes that help participants from the disability community develop theatrical skills and devise original theater pieces based on their imagination and interests; the ACTsmart Partnership Program, which provides free tickets to performances for students and partner teachers at Bay Area schools (including all San Francisco public high schools) with large proportions of socioeconomically disadvantaged students who otherwise would have little exposure to the arts; and the Young Conservatory Scholarships, which provides grants to disadvantaged local students who wish to pursue theatrical training at an advanced level, many coming out of A.C.T.'s school and community residency programs.

Large theaters also help to anchor smaller ones in the Bay Area's theater community. Bielstein notes, "We're an ecosystem of arts organizations in the Bay Area. By being able to combine work at large and small theaters, individuals can build a life and career here. At A.C.T. we share resources of costumes, props, space, and expertise with other organizations. We also all share audiences and cross promote our work. This combination of large and small organizations is critical to a healthy arts community."

Together with the Curran Theater, A.C.T. also helps to anchor business at nearby restaurants, particularly on Geary Street. Pointing to a loyal base of patrons from A.C.T., Colibri proprietor Eduardo Rallo observes that "Business goes up 10–20% depending on the show. When there's a popular A.C.T. play, it produces about a 20% increase in sales. When we took this space almost twenty years ago, the decision was based in part on proximity to the theater and its ability to generate traffic."



Alonzo King LINES Ballet

Founded in 1982 by acclaimed choreographer Alonzo King and Robert Rosenwasser, who continues to serve as Executive Director, LINES Ballet was created as a black-led organization that continues to champion diversity. A pioneer in modern dance that strives to make the art of dance movement accessible to everybody, its annual program is built around premieres staged each Spring and Fall at the Yerba Buena Center for the Arts, supplemented by extensive global tours. Appearances overseas have included performances at the Edinburgh International Festival, the Monaco Dance Forum, the Theatre National de Chaillot in Paris, and the Venice Biennale. The organization is based in studios at Seventh and Market Streets with a company of twelve full-time dancers, and each year more than 50,000 people in the Bay Area and worldwide attend its programs.

In addition to its public performances, Alonzo King LINES Ballet supports a range of education programs that includes three pre-professional summer training programs for young dancers ages 11–25. Divided into one-month segments determined by age, several hundred participants come from across the country and around the world each year, bringing revenue to the city, with scholarships available where needed. LINES also offers a Bachelor of Fine Arts (BFA) degree in conjunction with Dominican University of California, one of only two programs of its kind in the country. With opportunities to work with the company's

professional dancers, visiting choreographers and directly with Alonzo King, approximately forty students attend over a four-year period. Over the years, numerous independent dance groups have grown out of the BFA program. Other education programs include the LINES Dance Center, which provides affordably priced classes in ballet, jazz, hip hop, contemporary, and world dance to participants of all ages and levels.

The LINES flagship community program, “HeART with LINES,” is delivered in cooperation with the San Francisco Unified School District, East Bay public schools, and after school programs in the Bay Area, reaching more than 600 students each year. LINES Teaching Artists work with teachers to integrate movement into the curriculum, often providing the only exposure to dance that students—a majority of whom are youth of color and/or from low-income families—might receive. Resources and training are provided to teachers to enable follow-up instruction that can continue to incorporate movement-based curriculum in their classrooms. Another community program, Dance for Parkinson’s Disease, is specifically tailored for people with Parkinson’s Disease and their loved ones and taught by dance instructors with professional certifications and experience in teaching dance to communities with compromised mobility. These community programs are offered free of charge.



American Bach Soloists

Founded in 1989, American Bach Soloists is a leading ensemble focusing on the music of Johan Sebastian Bach and his contemporaries. Its creation stemmed from the perception that a gap existed in the Bay Area's musical landscape between its base of Early Music groups and broader institutions such as the San Francisco Symphony, leading to a wealth of musical literature that audiences were not hearing. Described by the Washington Post as "the best American specialists in early music...a flawless ensemble...a level of musical finesse one rarely encounters," ABS is recognized today as one of the world's leading companies of vocalist and period instrument performers of baroque music. Its discography includes more than twenty titles.

The ABS season includes an annual concert series presented in Belvedere (Marin County), Berkeley, Davis and San Francisco, and a holiday performance of Handel's Messiah each December. The season culminates in the American Bach Soloists Festival and Academy, held every summer in San Francisco. ABS has toured in Asia and has had great success in collaborations with Mark Morris, the Berkeley Festival and Exposition, San Francisco Girls' Chorus, and the Pacific Boychoir.

Education is an important part of its program. Since 2010, the annual American Bach Soloists Academy, held at the San Francisco Conservatory of Music, has provided training to advanced conservatory-level students and emerging professionals. Its offerings include personalized coaching and technical studies with masters of particular instruments. With approximately 40 instrumentalists and 12 singers admitted each year, more than 500 musicians from the U.S. and around the world have participated.

With the expansion of the ensemble's programs, the ABS budget has grown from approximately \$700,000 ten years ago to about \$1.5 million today. One economic impact is in Hayes Valley, where restaurants and retail are normally quiet in late July and early August when the Opera and Symphony are dark. The Academy, which is held at the Conservatory, draws more than 5,000 patrons to the area, many of whom patronize local establishments.



Asian Art Museum

Holding more than 18,000 artworks spanning 6,000 years of history, the Asian Art Museum of San Francisco is home to one of the greatest collections of Asian art outside of Asia. With the stated vision “to inspire new ways of thinking by connecting diverse communities to historical and contemporary Asian art and culture through our world-class collection, exhibitions and programs,” a key goal is to expand visitors’ focus beyond the formality of classical Asian art through a growing focus on contemporary Asian and Asian-American artists.

The collection galleries feature artworks from South Asia, Southeast Asia, West Asia and the Persian World, the Himalayas, China, Japan, and Korea and are supplemented by large and small temporary exhibitions that showcase diverse themes, materials and cultures. Recent exhibitions have included *Lost at Sea: Art Recovered from Shipwrecks*, *Tattoos in Japanese Art*, and *Awaken: A Tibetan Buddhist Journey Toward Enlightenment*. Reflecting the museum’s contemporary focus, other recent exhibitions have included *Kimono Refashioned*, showing the influence of Japanese kimonos on contemporary global fashion, and the works of both well-known and emerging 20th and 21st century Asian artists.

A wide range of public programs—including the annual Japanese bell ringing ceremony to mark the New Year (where participants can strike a 2,100 pound, 16th century temple bell), and other events such as the annual mochi (sweet rice cake) pounding and Lunar New Year festivities—connect visitors to living Asian cultures.

Approximately 260,000 visitors come each year, including 35,000 students. In FY 2020 (July–June) attendance fell due to construction of the museum’s new pavilion and COVID. Still, 138,000 guests including 13,000 students visited and nearly 12,000 people participated in hundreds of public programs; 19,000 received free admission, and there were 3,000,000 views on the Asian Art Museum’s YouTube channel.

Beyond engagement with the community, the museum’s economic impacts take many forms. Quarterly exit surveys indicate that approximately half of visitors originate from outside the Bay Area, including 10% that are international. That draw from outside the city produces net income for San Francisco businesses through restaurants, accommodations and retail.

Another economic impact comes through the recently completed Akiko Yamazaki and Jerry Yang Pavilion, which will deliver an additional 8,500 square feet of continuous gallery space—the largest column-free gallery in San Francisco. Resting atop the pavilion is the East-West Bank Art Terrace, the city’s largest outdoor space of its kind, which will showcase contemporary sculpture including works by Ai Weiwei and serve as a venue for live performances. The project was funded by a capital campaign that raised \$103,425,000 in private contributions, \$44 million of which funded development of the pavilion, supporting design and construction activity in the city.



Autumn Moon Festival

Held each fall along a six-block stretch of Grant Avenue between Broadway and California Streets, the Autumn Moon Festival is in its 30th year. Dating back more than 1,000 years in Asia, the festival—sometimes referred to as the “Chinese Thanksgiving”—traditionally marks the end and bounty of the summer harvest and is highlighted by abundant food including gifting of the popular mooncake, a flaky, semi-sweet pastry. The two-day event in San Francisco, which is organized by the San Francisco Chinatown Merchants Association, was created in 1991 shortly after the Loma Prieta earthquake, which destroyed the freeway link to San Francisco’s Chinatown—the nation’s oldest, largest and most historic Chinatown—and severely damaged its economy. Creation of the festival was designed to spur economic activity while showcasing the cultural richness of the Chinatown community.

More than 50,000 people attend today. Approximately 70% are local, but 30% or more come from outside the city. The nearly 40,000 people living within Chinatown’s densely packed 20 blocks, many of whom live in SRO rooms, are the primary audience and actively participate. Vendors in more than 100 booths sell traditional and other goods, and restaurants—the main beneficiaries of the festival—are packed. Lines for China’s traditional autumn mooncakes are particularly long.



Brava! for Women in the Arts

For thirty-five years Brava! for Women in the Arts has served as a professional arts organization supporting the artistic expression of women and underrepresented voices, and for twenty-five years it has operated the Brava Theater Center, a former vaudeville theater that is now a performance and community space in the Mission and home to its programs. Over that time, it has hosted Bay Area and world premier productions, traditional and contemporary music festivals, contemporary and experimental theater productions, and professional dance productions, producing more than twenty shows each year. Annual events include Baile en la Calle: The Mural Dances and the Son Jarocho Festival, which for eight years has brought performers of traditional dance and music from Veracruz. Annually, over 220 artists, teachers, technicians and administrators participate in its programs.

Active programs include Brava Artists-in Residence, which supports the professional development of directors, actors, dancers, musicians and visual artists with creative space and professional development services. Young people are a particular focus, with instruction in a range of fields from performance to design and the operation of lighting and sound

systems. The Mission Academy of Performing Arts at Brava (MAPA@Brava) trains youth aged 13–18 in theatrical production and performance through four programs: San Francisco Running Crew (which pairs youth with mentors for technical theater and design training), Cuicacalli Escuela de Danza (providing instruction in traditional and contemporary dance), Mariachi Juvenil la Misión (teaching mariachi style musical performance), and Young Thespians Theater Lab (which offers instruction integrating drama, dance, music and stagecraft).

With three stages, all of which double as rehearsal space, Brava also provides affordable space for artistic activities in the Mission community, with approximately 80 rental clients each year from diverse groups. Rates are set to accommodate what partners can afford. This positions the organization at the heart of the Mission community and the 24th Street corridor in particular, where Brava works with the civic organization Calle 24 and numerous arts nonprofits. Between 35,000 and 40,000 people attend Brava performances or programs every year, with the average visitor spending at least \$20 in the 24th Street corridor. Local restaurants typically see a 15% increase in business on performance days.



Burning Man

Burning Man began in San Francisco in 1986 with a summer solstice picnic on Baker Beach, where a wooden figure was burned as an act of creative expression. Ever since it has remained deeply rooted in the city and its culture. The event grew as an annual gathering at the beach until 1990 when, due to its size, Burning Man moved to Nevada's Black Rock Desert, where it has become a global cultural event and movement. The San Francisco-based Burning Man Project, a nonprofit, puts on the event as well as free and ticketed cultural events in the Bay Area throughout the year. Over the years, thousands of artists and performing arts troupes have participated in creative collaborations associated with the event.

Ten guiding principles frame the Burning Man movement: Radical Inclusion, Gifting, Decommodification, Radical Self-reliance, Radical Self-expression, Communal Effort, Civic Responsibility, Leaving No Trace, Participation, and Immediacy. Steven Ra\$pa, Burning Man's Associate Director of Community Events, describes the culture and its roots in San Francisco: "Burning Man has become a year-round global community that attracts people from across the political spectrum and unites people across ideological and national boundaries. It has inspired similar gatherings around the world but has always maintained roots in San Francisco's creative scene. Across the Bay Area, Burning Man has been fulfilling an important role as a forum for many different creative genres to meet, collaborate and cross-pollinate."

In the process it has helped to popularize interactive, immersive and experiential art, including machine art, fire art and tech art, where artists may often have few other alternatives.

In 2019, Black Rock City welcomed 80,000 residents, featuring more than 400 art installations, 120 interactive theme camps, and hundreds of mobile art vehicles including many that were made by artists from San Francisco. The San Francisco-based Burning Man Project, a nonprofit, puts on the event as well as both free and ticketed cultural events in the Bay Area; over the years thousands of artists and performing arts troupes have participated in these collaborations, including over 14,500 attendees, hundreds of visual artists and more than 500 live performers including many new and emerging artists in 2019 alone.

Burning Man's arts grant budget for work both inside and outside Black Rock City in 2019 was \$1.3 million, supported in part by San Francisco's Grants for the Arts program; since 1999 over \$13 million in grants have been awarded for associated community-generated art. As a side benefit, many local artists and performers who participate at Black Rock City or at events in San Francisco are hired by other festivals and art events globally; each year a Festival Organizers luncheon is held in Black Rock City to raise their profile. In San Francisco, the Project directly expended \$15,000 for art events in 2019. Burning Man also helps artists access free materials and provides a social network to help them find affordable living and studio space.

First time artists—whose work spans performance art, sculpture, painting, photography, dance, theater, music, media, and new technologies with creative applications—are prioritized. SF Decompression Heat the Street FaIRE brings new work to San Francisco that has just been featured at Black Rock City. Burning Man also pioneered "Temporary Art Pads," which are permanent locations for art that changes—including a

site on the Embarcadero next to the Ferry Building, at Patricia’s Green in Hayes Valley, and at Dogpatch Arts Plaza. Installations in the city of permanent works by Bay Area artists include “The Language of Birds” on the corner of Columbus Avenue and Broadway. Burning Man was also instrumental in developing the concept of parklets, which even before COVID were a growing presence in the urban landscape.

Beyond the Bay Area, Burning Man has become a global community, giving rise each year to over 100 official events in 44 states and 37 countries, that operate independently but are based on Burning Man’s guiding principles. In 2019, its Global Art Grants program—funded from donations and ticket sales from the Nevada event—gave \$100,000 to support free public art in cities around the world. The project’s Burners Without Borders program also awarded \$37,150 in civic arts microgrants (usually \$1,500 or under) in 2019 for creative projects that fulfill a civic function (for a total of \$266,811 since its inception in 2008).

With approximately 120 full- and part-time employees (which in normal years rises by several hundred with the addition of event-related seasonal employees and contractors), Burning Man contributes to the city’s economy directly through job creation and employment, and through expenditures that support sound, lighting, and power companies and professionals. In 2018, the leading categories of expenditure in its budget of \$44 million were payroll (32.6% or \$14.3 million), contractors (12.1% or \$5.3 million), permits and fees (9.3% or \$4.1 million), equipment rental (8.1% or \$3.5 million), office expenses (1.8% or \$797,811), payroll taxes and employee benefits (5.4% or \$2,371,133), and grants (5% or \$2,219,048) .

In 2019, the organization had approximately \$500,000 in expenses directly related to San Francisco arts events—for rent, catering, and payments to local businesses. Burning Man also draws tourism to the Bay Area and San Francisco, with tens of thousands of visitors visiting the region on their way to or from Black Rock City; many extend their stay for weeks in September and October for SF Decompression.





California College of the Arts

Founded in Oakland in 1907 as the Arts and Crafts movement in the United States took hold, California College of the Arts is a 113-year-old educational institution granting undergraduate and graduate degrees in a range of fine and applied arts. Since its founding, the school's approach has focused on interdisciplinary learning and the practical application of arts and design activity along with the engagement of young people with their social and economic environment. According to President Stephen Beal, "We're guided by practical idealism, and connected in the end to actually making things." In the last 25 years CCA has doubled in size, growing from a regional institution in Oakland to a recognized national institution that, with completion of its new campus, will be fully based in San Francisco.

Offering 22 undergraduate and 11 graduate programs, the campus supported 1,970 students in 2019, with programs spanning creative fields such as architecture, design, fine arts, humanities and sciences, animation, film, ceramics, fashion design, illustration, industrial design, jewelry and metal arts, painting and drawing, photography, and sculpture. The college is the first in the country to offer an MBA in Design Strategy, which links design with business skills, and a new major in Interaction Design (launched in 2012) focuses on how design impacts outcomes and people. While the curricula are discrete, the campus environment encourages interdisciplinary work and collaboration with crossover courses available and fields transparent to each other.

The campus is one of the most diverse in the nation: one third of CCA's students are the first in their families to go to college, and one third are Pell Grant eligible. International students from more than 50 countries make up 45% of the student body, with the balance from California (44%) and out-of-state (11%). Graduates go on to work in companies and firms such as Pixar/Disney, Apple, Intel, Autodesk, Facebook, Gensler, IDEO, Mattel and Nike, and a high percentage are hired locally. In addition to 270 staff, CCA employs almost 500 teaching faculty, of which 107 are full-time and 355 are part-time—most of the latter being professional practitioners. The school's \$100 million budget is funded almost entirely through enrollment. CCA awards about \$25 million in college-funded scholarships each year, with more than 73% of students receiving support.

The planned expansion of the College's San Francisco campus, launched in 2016, has produced new housing that, when fully occupied, will create a residential campus accommodating more than 900 students on or close to campus. Founders Hall, which opened to a limited number of student residents in the fall of 2020, includes a street-level restaurant, Makers Cafe, which will be open to the public once it is safe to do so in light of the pandemic. That development, in turn, should stimulate new business in the neighborhood and anchor the north end of an emerging arts district that extends to Dogpatch. A growing number of galleries are in the vicinity, as are artisan producers and maker spaces; the San Francisco offices of Adobe, located across the street,

include a maker space on the first floor. In addition to housing, the expanded campus will feature green space and flexible meeting and teaching space configured to promote cross-disciplinary interaction and collaboration. That includes “Double Ground,” the centerpiece of the college’s new campus expansion designed by the noted architectural firm Studio Gang, that will include ground-level working areas and studios with the open floors and wide doors needed to accommodate heavy equipment required in fields such as glassblowing, ceramics, metal sculpture, and furniture.

Outside its undergraduate and graduate programs, CCA also supports a range of youth programs. A residential pre-college program offers a college experience where high school students may earn college credit; a 1–3 week program, Summer Atelier, offers non-credit instruction for local students entering their sophomore or junior year of high school; and the Young Artist Studio Program offers 1–2 week classes for middle school students completing the sixth to eighth grades.





Carnaval San Francisco

Now in its fourth decade, Carnaval, a landmark parade and cultural event held in the Mission over two days each May, has in recent years grown to a year-round program. Cultural drum and dance classes for children and youth start in the fall, with preparations continuing throughout the year to build to the main event. The winners of children's and adult dance competitions become year-long ambassadors and get their own floats in the parade.

A Mardi Gras event, held each February in partnership with the Mission and 24th Street Merchants Associations, is attended by 10–15 thousand participants who in addition to attending a parade may visit as many as 20 or more different Mission venues (bars, restaurants and night clubs) featuring traditional Cajun or Mardi Gras food. Tuesday being a traditional slow night, the revenue flows through the neighborhood and supports the performers.

The annual main event, the Carnaval parade, includes as many as 33 different dance and music forms

from the Caribbean and Latin America including samba, soca, mariachi, and ballet folklórico. Three thousand performers and close to 75 organizations participate in the parade, with approximately 500,000 participating over a two-day period. Noted performers such as Mighty Sparrow (Trinidad), Oludum (Brazil), Celia Cruz, Aaron Neville and Los Tigres del Norte (Mexico) come from outside the Bay Area. Founder Roberto Hernandez notes that “you don't have to go to Trinidad, Brazil or Cuba. You can see all the traditions in San Francisco.” What is particularly notable, however, is the diversity of local talent. According to Hernandez, “We have a big vision around preserving our cultural traditions and showcasing them.”

The percentage of visitors to Carnaval from outside San Francisco has grown over the last seven years to nearly half (46%) in 2019, supporting local retail and restaurants. A study produced in the late 1990s by Comcast estimated that on average participants spent \$74 per day.



Chanticleer

Renowned men's choral ensemble Chanticleer was launched in 1978 by graduate student in musicology Louis Botto, who found it odd that the music he was studying—vocal music of the medieval and renaissance periods—wasn't being performed. The initial group of male singers—reflecting the tradition in most churches during those eras—was drawn from members of the San Francisco Symphony Chorus and the Grace Cathedral Choir of Men and Boys. Since its creation more than 100 men have sung with the ensemble.

Today Chanticleer regularly tours the most famous concert halls in Europe as well as in Hong Kong, Taiwan and China. Initially recording under its own label, Chanticleer went on to record for Teldec, which vastly increased its international exposure. Its 1999 release *Colors of Love*, devoted to contemporary choral works, won a Grammy and its recording *Lamentations and Praises* won two Grammys in 2001. The group has been inducted into the American Classical Music Hall of Fame, high recognition in the classical music world, and has commissioned and premiered over 90 pieces by 70 composers.

In addition to its world tours each year, Chanticleer performs four concert series in the Bay Area. The most popular is a Christmas series of eight concerts held at venues such as St. Ignatius Cathedral, that culminates at Carmel Mission. Drawing 10,000 attendees, it generates nearly half of the group's annual revenue.

Chanticleer's educational programs reach approximately 5,000 students each year, with concerts and demonstration lectures held in schools throughout the Bay Area. The Louis A. Botto Choir (LAB Choir), a high school and college-level mixed a capella group, meets for three four-week sessions with performances throughout the year, each session featuring a new group of students. Each year a Skills/LAB intensive summer workshop engages 100 competitively selected high school students; master classes are offered for adults at universities nationwide. Every year Chanticleer also organizes the Youth Choral Festival, which features high school choirs from across the greater Bay Area, and every five years it hosts the National Youth Choir Festival, which brings choirs from across the United States to the Bay Area for a multiday workshop, coaching by Chanticleer members, and a closing concert in Davies Symphony Hall.



Chinese Culture Center of San Francisco

Fifty-five years old, the Chinese Culture Center of San Francisco was founded in Chinatown as a space for the Chinese community in 1965 during the height of the civil rights movement. It still serves the Chinatown community today, engaging residents, visitors, and increasingly the underserved. At the time of the Center's founding, diplomatic relations with China had not been established and the founders perceived that there was no dedicated place in San Francisco to showcase Chinese arts and culture. Now the Center focuses on contemporary art and explores the Chinese diaspora by presenting Taiwanese, Hong Kong and other artists.

The Center's activities include 2–3 rotating exhibits in its main gallery space every year and a "museum without walls" initiative that takes art out into the community. It also sponsors two festivals: the Chinatown Music Festival held on Portsmouth Square every August, and "Dancing on Waverly" held on Waverly Street each July. Approximately

half of attendees at the Center's festivals are local. San Francisco's Chinatown is the second most densely populated place in the United States and has always been a gateway for immigrants, many living in SRO rooms. Those 20–30 thousand residents are the Center's primary focus for both festivals and programming. The other half of festival attendees come from outside San Francisco, bringing added business to the neighborhood. Surveys indicate that local restaurant patronage spikes by as much as 50% on festival days.

Programs are generally oriented toward supporting the Chinatown community through place-based activities and engagement but also draw participants from around the city. Educational programs include free tours of the Center's gallery and tours of Chinatown, particularly for families and schoolchildren. The ArtBuds early art education program brings in groups of pre-kindergarten children, with a particular focus on low income families.



The Contemporary Jewish Museum

Opened in 1984, The Contemporary Jewish Museum occupies an 1881 former power plant in the Yerba Buena District, converted for use as museum space by famed architect Daniel Liebskind. A non-collecting institution, the museum has no permanent holdings, but instead partners with national and international institutions to present exhibitions that both meet high artistic standards and are timely, with the ultimate goal of making the Jewish experience relevant to 21st century audiences.

Recent exhibits have documented the contributions of cultural figures such as Bay Area rock impresario Bill Graham. *Levi Strauss: A History of American Style* opened in February 2020 but was curtailed in March due to the pandemic. The next major exhibit, scheduled to run October 2021 through January 2022,

will focus on singer/songwriter Leonard Cohen. The museum receives an average of 40,000 visitors per year, of which half are non-Jewish. Twenty-five percent of visitors participate in on-site educational activities such as interactive talks and family programs.

Educational programs include *What We Hold*, an audio project for youth that focuses on values and experiences that are passed from generation to generation; *Teen Art Connect*, which connects students and local artists; school tours; and a *Community Access Partnership*, available to social service agencies, that reduces barriers to access for underserved and low-income Bay Area residents. On site, the Helen Diller Institute Collaborative Workspace provides a setting for scholars and project teams to curate content and programs.



Dancers' Group

Founded in 1982, Dancers' Group supports artists, choreographers and the dance community through programs and services that help them work and serves as a national model in the dance community. Among its roles, the Group serves as a fiscal sponsor, receiving, holding and administering funds where the grantees lack their own nonprofit status and the necessary administrative capacity to accept donations and grants. Grants for both dance companies and solo artists are received and dispensed through its 501(c)3 organization, with all forms of dance—from ballet folklorico to hip hop—being covered. Everything is movement based. Donors include a broad range of local Bay Area and national foundations, including the San Francisco Arts Commission and Grants for the Arts. Dancers' Group has a budget of \$2.2 million, and most grants are small, with the largest being \$50,000 over two years. When groups generate more capacity and structure they typically incorporate as a nonprofit and handle their own administration.

A related priority for Dancers' Group is programming that brings dance to publicly accessible spaces to stimulate public interest in dance and position dance at the heart of civic life. Bay Area Dance Week, presented by Dancers' Group and one of the nation's largest, most inclusive celebrations of dance, takes place in the spring each year, offering workshops, performances, classes, and open rehearsals, all free of charge. Modeled on the Open Studios idea, studios across the city are opened

to the public for classes or performances. The dance forms covered are diverse, from Bolivian folkloric dance to Tahitian dance, Congolese dance, hula, and hip hop. As the largest per capita center for dance in the United States, Dancers' Group presents events that are among the best attended of their kind in the United States. Each year more than 100 organizations involving more than 2,500 artists and 20,000 attendees participate.

Other programs include the Rotunda Dance Series, cosponsored with World Arts West, which brings many of the Bay Area's most celebrated dance companies to San Francisco City Hall for free monthly noontime performances. Another program, ONSITE, offers free, large-scale site-specific presentations.

In 2019, Dancers' Group served and provided access to 1,700 members and engaged 35,000 audience members through its public programs. One hundred twenty-three artists received fiscal sponsorship, with the regranteeing program distributing over \$90,000. The group's monthly publication, *In Dance*, reaches 66,000 readers each year. Recognition for its work includes five Isadora Duncan Dance Awards. Emphasizing the importance of supporting individual artists and smaller companies, Executive Director Wayne Hazzard says, "We have our large institutions and you could say that's what draws the tourists. But if we don't place equal value on smaller and medium size dance companies the ecosystem will be in danger."



Fine Arts Museums of San Francisco

Fine Arts Museums of San Francisco oversees the de Young Museum in Golden Gate Park and the Legion of Honor in Lincoln Park, overlooking the entrance to San Francisco Bay. Together they compose one of the great art collections in the United States, including European masterworks, the cornerstone Rockefeller Collection of America Art, and prized holdings of art from Africa, Oceania and the Americas.

In 2019, close to 1.5 million people came to the museums, including approximately 1 million paid visitors and hundreds of thousands visiting free public spaces such as the de Young's viewing tower and sculpture garden. Visitor levels spike during blockbuster exhibitions. Major exhibits in recent years have included Late Monet (viewed by more than 300,000 people) and the Summer of Love retrospective (seen by 250,000). Other important exhibits have probed new fields, such as Soul of a Nation (which presented the work of African-American artists), and Contemporary Muslim Fashion (which featured women's high fashion from Muslim countries). The current Frida Kahlo: Appearances Can be Deceptive exhibit, which was to open in March 2020, the same week the Museum was forced to close due to COVID, was expected to be another blockbuster, but with limited reopening September 2020 was made available for visitors to see through May 2, 2021.

FAMSF's \$65 million budget includes approximately \$20 million coming directly from the City for maintenance of the buildings (which the city owns) and related services and approximately \$45 million coming from COFAM (Corporation of the Fine Arts Museums, a nonprofit operating entity) that covers the museums' other functions including curators, exhibition staff, front of house staff, management, fundraising and marketing. Of COFAM's revenue, approximately one-fourth is earned through ticket sales, retail sales and rental of facilities, and three-fourths is contributed (including museum memberships). In total, the museums employ approximately 350 people: 250 people by COFAM and another 100 by the City.

FAMSF's 100,000 members put it at the top of museums nationally for member participation, with only the Metropolitan Museum and the Museum of Modern Art in New York and ranking higher.

The museums support active educational and community engagement programs, particularly tied to school curricula, with approximately 40,000 schoolchildren visiting each year for special programs. Special access is also provided for under-represented groups and free admission is available to Bay Area residents on Saturdays, when additional lectures and public programs are offered. Visitors from outside San Francisco come primarily from Marin, Alameda and San Mateo Counties.



Fort Mason Center for Arts & Culture

Since 1977, Fort Mason Center for Arts & Culture (FMCAC), a pioneer in the adaptive reuse of former military sites, has developed and implemented a widely replicated model for nonprofit stewardship of historic facilities—in this case the adaptive reuse of the San Francisco Port of Embarkation, a National Historic Landmark. Its activity supports diverse educational and nonprofit organizations that are resident on its campus, through more than \$2.5 million in annual grants and cultural programming that attracts more than 1.5 million visitors annually.

With a \$12 million annual budget, the Center is home to nearly two dozen nonprofit arts and cultural organizations and businesses that align with its mission. Residents include Magic Theatre, one of the leading theaters in the U.S. solely dedicated to the development and production of new plays and home to premieres of more than 200 new works including premieres by noted playwrights such as Sam Shepherd and David Mamet. The Blue Bear School of Music has provided affordable music education to aspiring musicians at all skill levels since 1971. World Arts West, which hosts the San Francisco Ethnic Dance Festival, has also been based at the Center since 1971.

The Museo Italo Americano, a resident since 1985, was the first museum in the United States devoted exclusively to Italian-American Art and Culture. The SFMOMA Artists Gallery displays the work of contemporary Northern California artists, with eight exhibitions per year. The San Francisco Art Institute, founded in 1871, supports a 67,000 square foot second campus on a historic pier with more than 160 studios for students, faculty and visiting artists and 3,300 square feet of public exhibition space. The Long Now Foundation with its bar-café-museum The Interval is home to an acclaimed lecture series focusing on sustainability and long-term thinking. Other residents include the Friends of the San Francisco Public Library, the Young Performers Theater and The Hivery, a creative co-working space. Greens restaurant is among the oldest and most prominent vegetarian restaurants in the United States.

In addition to these resident organizations, FMCAC's facilities host an array of conferences, events, and festivals, including the FOG Art + Design fair, Art Market SF, the Fall Show, craft fairs that support and engage local "makers," and programs such as the recent Art in America speakers series.



Illuminate

“Light, a potent and unifying medium—it lives in the heart of every origin story. Awe is something we all share.”

— Ben Davis, CEO, Illuminate

Since 2011, Illuminate has delivered iconic, large-scale public art in San Francisco using the medium of light. A core operating principle is that nothing it creates should require paid admission. As stated by founder Ben Davis, “public art should be part of the spiritual infrastructure of the city.” A McKinsey report estimated that Illuminate’s projects reach 20 million people annually. Many invitations to do projects have come from around the world, but the organization has committed to working only in San Francisco. As Davis puts it, “I want San Francisco to be recognized as The City of Awe. Over time, our work should define San Francisco the way that Gaudi’s work creates a distinct identity for Barcelona.”

Illuminate’s flagship project, The Bay Lights—the largest LED lighting sculpture in the world—has become emblematic of the city and is recognized throughout the world. Illuminate attracted artist Leo Villareal and worked with the California Department of Transportation and a dozen other government agencies to permit and install 25,000 LED lights on the western span of the San Francisco–Oakland Bay Bridge, bringing the San Francisco nighttime waterfront to life. Unveiled in 2013 and originally intended as a temporary two-year installation, the artwork’s instant popularity led to \$5 million in private fundraising through crowdsourcing and major donors to make the installation a permanent feature of the city. A new and upgraded set of LEDs was

installed in 2016 and the artwork was officially gifted to the people of California. Union electricians worked at night on the installation. The project has contributed significantly to the revitalization of the waterfront, with bars and restaurants reporting a 30% increase in business after its opening. A group of 20 independent analysts, convened shortly after the lights went up, estimated informally that through their stimulative effects on business and property values, the lights would contribute \$100 million annually to the Bay Area’s economy, or \$1 billion over ten years.

Other recent Illuminate projects have included Photosynthesis, the lighting of the Conservatory of Flowers in Golden Gate Park in 2017 to mark the 50th anniversary of the Summer of Love. Thirty-thousand people attended the opening free concert and grand lighting. Since the lights came on, the Conservatory has seen a 700% increase in membership, an increase of 200–300% in daytime paid visitors, and more frequent nighttime rentals. Illuminate the Pink Triangle, a symbol of hope and inclusiveness on the slopes of Twin Peaks, was mounted in June 2020 with support from \$106,000 in crowdfunded donations that created an endowment. Expanding on an unlit triangle first installed in 1996 to mark Pride Week, the installation is nearly 200 feet across, an acre in size, and can be seen for twenty miles. Davis explains “We want people to lift their eyes to the light and see their better nature.” Subsequently gifted to Pink Triangle founder Patrick Carney, the lights will be reinstalled each year in June. At Grace Cathedral, Illuminate’s installation by artist George Zisiadis called Grace Light launched in 2019. A word-of-mouth sensation,

it was immediately oversubscribed by visitors. Illuminate gifted the installation to Grace Cathedral, where it now shines as part of the institution's permanent art collection.

Projects in the works include Illuminate the Void, which in partnership with Paint the Void will commission artists to illuminate boarded up storefronts during COVID "to keep the city feeling alive and vital during the long nights of winter"; VOICE at the Bayview Opera House, which will create a light wall on the building's exterior that can also serve as a performance backdrop; and the revival of the Bandshell, which will

redesign the stage, increase ADA accessibility, install theater-quality sound and illuminate the historic Spreckels Temple of Music in the heart of Golden Gate Park. Produced with private funds, the Bandshell project is seen by Illuminate as "poised to be the centerpiece of San Francisco's emotional and spiritual recovery, as people gather outdoors first before they can return to indoor venues."

With a core staff of three, Illuminate covers operating costs primarily through contributions by a handful of leading San Francisco families who provide \$50,000 each for three years as well as grants.





Lamplighters Music Theatre

Lamplighters Music Theatre was founded in 1952 to present the full repertoire of Gilbert & Sullivan light operas and other comparable works. Now in its 68th season, the company is considered to be one of the best Gilbert & Sullivan ensembles in the nation and the world, having received multiple awards at the prestigious Gilbert & Sullivan Festival in Buxton, England, among other accolades.

Each season the company performs at five venues in the region: at Yerba Buena Center or Herbst Theater in San Francisco, and in Mountain View, Livermore, and Walnut Creek. In all, there are three full productions and 25–35 performances, plus a gala fundraiser at the Herbst Theater each fall. The company supports 2 full-time and 86 part-time employees and 55 independent contractors. A full performance typically requires 100 people to stage.

Lamplighters supports three major educational programs. In the Interactive Assembly, performers from the company visit Bay Area schools for 45-minute participatory programs that introduce students to the music of Gilbert & Sullivan. Mini Residencies involve the mounting of condensed versions of Gilbert & Sullivan classics with participation by students and members of the company and with Lamplighters providing the costumes, scripts and music. Both the Interactive Assembly and Mini Residencies are paid but very affordable programs with scholarships commonly available. The San Francisco Conservatory of Music summer program, contracted for the last 18 years by the Conservatory, provides two weeks of intensive training to young people that culminates in a staged performance of famous G&S scenes.



Litquake

Started as a one-day literary gathering with approximately 100 authors and a small audience in 1999, Litquake has grown to become an annual festival attracting 600–800 authors and writers and 19,000 participants. The main event now spans ten days, including the culminating program Lit Crawl which, combined with year-round programming, brings annual participation above 24,000 spread across more than 250 events; 85% of programs are free.

Lit Crawl, a one day event in the Mission that is part of Litquake, includes presentations at more than 100 local venues—ranging from coffee shops to laundromats, police stations, bars, and auditoriums—where participants can walk from site to site. Attendance at the Crawl, which takes place between 5:00 and 9:00 pm, ranges between 5,000 and 8,000 each year with participants patronizing bars and restaurants before, during and after. According to Deputy Director Todd Graham “People definitely treat it as a night

on the town.” While most of those attending are local, 45% come from the East Bay and other cities outside San Francisco, bringing added revenue to the community. Authors, 90%+ of whom are local to the Bay Area, benefit from additional exposure for their work, as do local independent booksellers.

Educational programs include Kidquake, an annual event that brings over 800 K–5 students to the San Francisco Public Library for two days of assemblies and workshops with noted children’s authors; Teenquake, which includes Teenquake Writing Awards, readings and other events designed to inspire teenaged authors; an Elder Project that delivers two month writing and storytelling courses to retirement homes in San Francisco and Oakland; and year-round adult master classes in poetry, memoir writing, novel writing and short stories led by noted authors and literary award winners.



Na Lei Hulu I Ka Wekiu

Founded in 1985 by Patrick Makuakane, a recognized kumu (hula master), and now in its 35th year, Na Lei Hulu is a renowned school and professional company dedicated to traditional and contemporary Hawaiian dance. The halau (school of Hawaiian dance) breaks out as two activities: a professional dance company of 40 that stages public performances and a school for beginning and intermediate dance that also teaches elements of Hawaiian language and culture. Hula and Hawaiian music often grow out of families, and with the company's duration, mothers and daughters now perform together. The company's performances offer full scale theatrical productions blending traditional with modern forms of Hawaiian dance that may include music such as opera, electronic, dance and pop. Its 2019 show *I Mua: Hula in Unusual Places*, for example, took audiences on a journey to Burning Man, San Quentin and the San Francisco Opera. The group's spirit, as described by Makuakane, is one of "evolving culture, not just preserving it." For those reasons, Na Lei Hulu I Ka Wekiu is considered by many to be a leading innovator in the art form.

Over the years, thousands of students have passed through the school's doors, with approximately 250 students taking classes in a normal year. Class programs are closely integrated with the work of the dance company. At a higher level, 2019 saw a major event that is rare in the world of Hawaiian culture: a uniki, or traditional graduation ceremony for dancers at different levels, culminating several years of intensive study in the traditional arts that includes key rituals passed down through generations.

The halau serves as an anchor for the Hawaiian community in San Francisco and the region, connecting not only to the Hawaiian and Pacific Island community but to a wider group of people of all backgrounds who are connected to or have visited Hawaii. As Makuakane puts it "the most important aspect of what we do is community. Coupled with art, passion and culture that makes an impressive mix."



Nihonmachi Street Fair

Launched in 1974 at a time when Japantown was being redeveloped and residents feared the loss of homes and communities, the Nihonmachi Street Fair (NSF) was put together by young people in the Japanese-American community as a grassroots effort to connect and energize the neighborhood. Smaller and more grassroots than the annual Cherry Blossom Festival, the NSF has brought together Asian and Pacific Island nonprofits, vendors and artists for two days every year in an area bounded by Laguna, Fillmore and Webster Streets and Geary Boulevard. Recent performers, drawn primarily from the Bay Area, include the San Francisco Taiko Dojo and Hawaiian, Filipino, Chinese, Korean, Mongolian and Japanese cultural groups as well as local musical performers. Approximately 30,000 people attend each year, including 1,000 artists, performers, nonprofit representatives, and volunteers. With NSF's 46 years of history in the community, participation in its cultural offerings is often multigenerational.

NSF is an organization run by volunteers with a modest budget of \$130,000. Its largest source of funding is Grants for the Arts, with the rest coming from food concessions, approximately \$20,000 in income from its annual Aloha by the Bay festival (which attracts regional performers as well as headline artists from Hawaii), a corporate sponsor (Clear Channel Outdoors) that helps with advertising, and revenue from bingo nights that is saved to a rainy day fund. A 2015 report by the City of San Francisco estimated visitor spending at the 2014 fair of \$564,000, of which was 29% was at the event itself and 71% at other local businesses. Including indirect and induced impacts, the total visitor impact was estimated to be \$1.1 million, including \$121,000 at retail establishments and \$43,000 at hotels.



ROXIE

Roxie Theater

Located on 16th Street in the heart of the Mission District, the Roxie Theater—operating since 1911 and now one of the oldest continuously running cinemas in the country—is an anchor of the Bay Area’s independent film community. Twelve to eighteen films are normally screened per week, led by documentaries, hard to find and independent films, with a particular focus on Bay Area filmmakers and Bay Area-based films. Dedicated Spanish language programming (RoxCine) is scheduled at least once a month. In 2019, the theater’s second highest grossing film was *The Last Black Man in San Francisco*, whose producer Joe Talbot grew up going to the Roxie; the film had four sold-out performances followed by Q&A sessions with Talbot.

The theater hosts 35–40 film festivals each year and has incubated many small ones. Executive Director Lex Sloan notes that “it’s a huge part of our business and also a huge part of our mission.” Festivals hosted in 2019 included the San Francisco Film Festival, Frameline (presenting LGBTQ films), DocFest (documentaries), IndieFest, the Czech That Film Festival, and Cine + Mas (Latino/a), engaging highly diverse audiences.

After operating in several forms, the Roxie became a nonprofit in 2009, which enabled it to grow a community of members and donors and probably saved it from the extinction experienced by many other small theaters. Its current budget is based on a combination of ticket sales, memberships and grants. After almost closing in 2015, membership has grown 640% in the last five years, with 800 members enrolled at the end of 2019. Sloan observes that if the Roxie

wasn’t a nonprofit it would have to charge much higher ticket prices (\$18 versus \$13 general admission with \$9 admissions rates for seniors and children under 12). The theater’s two houses (Big Roxie with 234 seats and Little Roxie with 49 seats) are rented out 150–200 times per year, with corporate rates subsidizing affordable community rates (for example for a local filmmaker who’s shopping for GoFundMe partners).

Since 2018, the theater has also offered the Roxie Review, which invites local filmmakers to quality check their newly finished films on a big screen before release to film festivals. Fees are on a sliding scale and for many the service is free. Another initiative, the Roxie Mixtape, supports local filmmakers by inviting students and others to submit films and connect with each other, leading to 14–15 screenings per year.

The theater also curates the art of film on celluloid, with two 35 mm projectors in the Big Roxie that have been in place since 1943, and a 16 mm projector in the Little Roxie. The goal is to keep the art alive and train young projectionists. Quentin Tarantino, who produced a celluloid print of his recent film *Once Upon a Time in Hollywood*, showed it at the Roxie.

Patrons of the theater are a significant source of income for local businesses, particularly in the 16th Street and Valencia area. Many viewers come to the area for dinner, a movie and the Mission experience. In FY 2019, more than 800,000 people purchased tickets, not including participants in rentals. Since closing in March 2020, the Roxie has been offering virtual screenings of new films.



San Francisco Ballet

The San Francisco Ballet, founded in 1933, is the oldest professional ballet company in the United States.

In 1944, the company presented the first full-length production of *Nutcracker*, which has since become a Christmas tradition for generations of San Francisco and Bay Area families. More recently, the company has pushed the boundaries of dance, commissioning groundbreaking new works by many of the nation's leading choreographers. That and the quality of its dancing has elevated the San Francisco Ballet to global status, with performances at Lincoln Center in New York, the Paris Opera House, Sadlers Wells Theatre in London, and in China in Beijing and Shanghai. Reviews have described the company as being "among the world's most elegant and refined companies," and "one of a triumvirate of great classical companies defining the American style on the word stage" alongside the American Ballet Theater in New York and the New York City Ballet.

The ballet is accompanied by its own orchestra and supports one of the nation's most prestigious schools of ballet. Multi-level educational support includes pre-ballet for children aged 4–7, workshops for intermediate and advanced students, and a trainee

program that bridges the transition from student to professional dancer. Sixty-five percent of the San Francisco Ballet's current company of dancers has been trained at the school. Other community offerings include adult programs spanning both dance classes and lectures. Program administrative staff is non-union, while both dancers and musicians are represented by theatrical unions.

Approximately half of the Ballet's revenue (\$25 million in 2019) comes from ticket sales and school tuition, with the other half (\$25 million) contributed through individual giving, foundation, government, institutional and corporate grants.

While coming off a very successful fiscal year in 2019, SF Ballet is focused on the challenge of how to make ballet as an art form more appealing to a diverse audience and to the younger, technology-oriented residents who increasingly make up the city and the region's workforce, particularly when more digital entertainment is widely available; its strategies, including what Executive Director Kelly Tweeddale terms "extending the art form beyond the stage," are documented in a December 2019 Harvard Business School case study.



San Francisco Conservatory of Music

Founded in 1917 as the first conservatory of music on the West Coast, the San Francisco Conservatory of Music is together with Juilliard in New York today one of a handful of leading music schools in the United States that provide degree programs in classical and other disciplines. In 2006 it moved from its home since 1957 on 19th and Ortega Streets to new facilities in a historic building on Oak Street that now helps to anchor the Hayes Valley–Civic Center performing arts district. In addition to classrooms those facilities include a 400-seat theater and several intimate performance spaces. The \$193 million privately funded Bowes Center, opened on Van Ness Street across from Davies Symphony Hall in October 2020, more than doubles the Conservatory's capacity with the addition of housing for 420 students, two concert halls, practice rooms, recording studios, a student center, and apartments for visiting artists and faculty. Students from San Francisco Ballet will also be housed at the center.

The school distinguishes itself by training not only the next generation of musicians for orchestras, but also preparing students for alternative music-related careers, including technology applications and music for video games. The Conservatory also supports an active jazz program. Approximately 450 students, half undergraduate and half graduate, take classes while others pursue post-graduate certificates to hone their skills. Ninety-nine percent of degree students receive scholarships that on average cover 57% of tuition. In 2019, 135 students graduated with either a Bachelor's or Master's Degree in Music. Students from 30 countries and 34 states attend, including many from China. Approximately 200 students also participate in a pre-college program that enables them to work

with private instructors and on weekends. Most graduates go on to perform in symphony orchestras, chamber orchestras or to teaching roles, particularly in public schools.

The Conservatory supports 26 full-time and 140 part-time collegiate faculty, including 30 members of the San Francisco Symphony, San Francisco Opera and San Francisco Ballet orchestras, and the SFJAZZ Collective. Class offerings cover a wide range of classical disciplines including conducting; roots, jazz and American music; woodwinds; brass; ensembles; keyboard; strings; voice; composition; guitar; percussion; and technology and applied composition. Global classical music stars such as Alfred Brendel, Plácido Domingo, Beverly Sills, Yehudi Menuhin, Pinchas Zukerman, Yo-Yo Ma, Federica von Stade and John Adams regularly participate in master classes. An innovation in the curriculum, the Technology and Applied Composition program, trains composers who are at home in the realm of concert music but also film and video game scoring and sound design. Its graduates work in Bay Area companies such as Ubisoft, Facebook, Electronic Arts, Playstation Network and Dolby.

Close to 700 performances are presented each year, most by students and free and open to the public. The calendar spans from recitals to master classes to full orchestral ensembles. Annual attendance is more than 30,000.

Educational programs also connect to the community. Conservatory Connect takes live music into schools, hospitals, retirement homes, children's facilities, homeless shelters and other places where people

of limited means and mobility are seldom reached, with approximately 150 performances each year. Conservatory in the Schools supports music training in public schools, where conservatory students teach instrumental lessons, coach chamber groups, and assist classroom teachers in local elementary, middle and high schools. Bridge to Arts and Music is a partnership with Third Baptist Church, Temple Emanu-El and

the San Francisco Interfaith Council that provides after school music instruction to K–12 students, with Conservatory students working alongside teachers to offer instruction in voice, piano, music theory and music history. In the 2018–19 fiscal year, Conservatory programs reached more than 2,600 people with limited access to music and about 2,600 K–12 students in local public schools.





San Francisco Ethnic Dance Festival

Founded in 1978, the San Francisco Ethnic Dance Festival has its roots in the wave of immigration that entered the Bay Area and the United States after the passage of the 1965 Immigration and Nationality Act. Diverse immigrant artists came from Cambodia, Ghana, China, India, Iran, Senegal, and other countries. As the San Francisco Bay Area experienced rapid demographic change, Grants for the Arts founded the Festival as a platform to give visibility to these cultures, making it the first city-sponsored, multicultural dance festival in the United States. Since 1982, when the City contracted with World Arts West to produce the annual Festival, its audiences have grown steadily.

In 1988, World Arts West presented San Francisco Ethnic Dance Festival artists at the Kennedy Center in Washington DC to critical acclaim. The artists, including Alleluia Panis, Chitresh Das, and Malonga Casquelourd, were pioneers in bringing professional-quality culturally specific dance to the United States. Since then, the Festival has presented both dance traditions that have existed for generations and innovative choreography using elements of traditional dance, such as the taiko-bharatanatyam collaboration between Abhinaya Dance Company and San Jose Taiko in 2011 and the Flower Duet in 2017, featuring traditional hula danced to live French opera music.

Over the years, the number of artists in the world dance community has grown dramatically as artists who have participated in the program have become directors of dance groups and have students of their own. The multigenerational nature of the process launched in 1978 has helped build a rich ecosystem that is still expanding. Today, World Arts West is a

regional presenting service organization that serves the largest network of world dance in the nation, with over 450 dance companies and 20,000 artists representing more than 100 distinct cultures in Northern California. Executive Director Anne Huang notes that “no one comes close to doing this in the entire country.”

The Festival normally takes place over 2–3 weeks every June and July, preceded by public auditions in November where 70–100 groups compete for an opportunity to be one of the 20+ groups to perform in the Festival. Diversity of representation is a priority, with performers in 2019 representing traditions in the Congo, India, Japan, Mexico and Lebanon among others. Presentations range from small groups to large production numbers. Dancers selected for the 2020 program represented traditions from India, Guinea, Mexico, Hawaii, China, Spain, the Philippines, Uzbekistan, Tahiti, and Central Europe.

Educational and community outreach takes many forms. For 15 years, the People Like Me program has offered field trips for children K–6, often providing their first-time exposure to world dance forms including those from their own cultures. World Arts West is particularly focused on supporting capacity building and professional development inside the dance community. Many world dance companies are financially under-resourced, run by volunteers, and lack the infrastructure required to apply for grants or increase the company’s exposure. To address those challenges, World Arts West launched the Artist Service Program in 2019 to provide professional development workshops and artist resource newsletters, and it launched its first cultural artist grant writing training cohort in 2020.



San Francisco Opera

Since 1923, the San Francisco Opera has been known for its world premieres, for training some of opera's most promising young artists, and for being one of the world's great opera companies. Its home, the War Memorial Opera House, built entirely from community donations, opened in 1932.

Today the Opera employs approximately 1,000 people over the course of a year in different capacities, including full- and part-time. The orchestra has a core of 69, expanding to up to 90 depending on the repertoire. The professional Opera Chorus numbers 48, but can expand to 80–90 for certain pieces, and there are some 100 principal opera singers who appear with the company each year. Other positions include front-of-house staff (ushers and box office personnel), and stage personnel who build and bring to life the stage productions (approximately 300, with a regular core of 60). Costume and scene shops employ another 40–50. Employees of the San Francisco Opera are represented by eight unions. There is an administrative staff of just over 90.

The Opera's professional development programs are globally recognized. The Merola Opera Program, launched in 1957 and the first of its kind in the United States, trains young adults. Each summer 23 singers, five apprentice coaches and one apprentice stage director are selected from 1,000 applicants to participate in a free twelve-week residency that nurtures the next generation of opera superstars. The Adler Fellowship, a multi-year performance-oriented residency for promising young artists, is one of the world's most prestigious programs for

advanced training. The fellows, selected from Merola participants, gain experience through supporting roles in the Opera's main-stage productions. Together, the two programs have launched the careers of generations of opera stars.

Located next door to the Opera House on the fourth floor of the Veterans Building, the Diane B. Wilsey Center for Opera hosts an intimate performance and rehearsal space and an education center for student, family and adult programming. Its studio is part of an active community education and outreach program that includes virtual and in-school K–12 programs and field trips developed in partnership with the Opera Guild. Youth-oriented activities include "Book to Bravo!" where students create in English or Spanish operas that are inspired by a story or fable; "Voices for Social Justice" where students create musical stories based on challenges they face; and youth performances such as "Lucinda y los Flores de la Nochebuena," a contemporary bilingual opera based on a Mexican folktale.

At a larger scale, community outreach during the Opera's annual opening week occurs through Opera at The Ballpark, a free simulcast held at Oracle Park and attended by 25–30 thousand people, with blankets spread on the outfield lawn and vendors selling beer and hot dogs. More than 70% of patrons attending San Francisco Opera performances come from outside San Francisco, bringing revenue to the city. Many patronize San Francisco restaurants, particularly in nearby Hayes Valley.



San Francisco Pride

An iconic, two-day celebration and parade and the largest outdoor event in San Francisco, Pride attracts 700–800,000 participants in a typical year, including roughly 50,000 people marching in more than 250 contingents in the Parade, along with several hundred thousand observers cheering along the route.

Beyond the Parade itself, the two-day Celebration in Civic Center is a cultural event, typically composed of more than 20 community-programmed stages and venues (with a focus on often underserved demographics), such as the Asian & Pacific Islander LGBTQ Pride Pavilion and Stage, the Family Garden oasis, The Don Julio Latin Stage, Homo Hip-Hop, and others. Organizers also work with independent producers and venues throughout the city during the month of June; these “Official Pride Events” serve to distribute activity, further raise artists’ profiles, and generate shared revenues from ticket sales.

As the nation’s largest LGBT gathering, nearly half of participants come from outside San Francisco, generating crucial income for many of the Bay Area’s LGBTQ-owned businesses and putting hotel room prices at a premium. This makes Pride a major economic event in the city. A 2015 survey conducted by the City—based on the 2014 event—found that of the expected 550,000 visitors, some 80% were from outside San Francisco. Total spending generated was estimated to be \$219.2 million. The event is particularly significant for small businesses in the Castro, which have struggled with the loss of earlier street festivals.

“Pride week is by far the busiest time of year in a typical year. We have to shift our entire business model to accommodate for the business everything from increased cleaning and trash service down to changes in glassware. We have to bring in extra staff for the weekend, and security staff triples. We add an additional floor management position and our entertainment staff increases significantly with continuous entertainment throughout the weekend, typically flying in entertainers from out of town. Overall we hire 30–35 workers and additional staff over and above our existing contracts.

In terms of revenue, in a typical year our revenue Thursday through Sunday is equivalent to an entire slower month (November or February). But because of how the increased sales volume impacts profitability, the week of Pride generates the equivalent of 3–4 regular months of income.”

— Chris Hastings, Owner, The Lookout



San Francisco Symphony

Dating to 1911 and San Francisco's cultural regeneration following the 1906 earthquake, the San Francisco Symphony is considered one of the leading symphony orchestras in the nation and the world. It has been led in the intervening years by distinguished music directors such as Seiji Ozawa, Herbert Blomstedt (who continues to serve as Conductor Laureate) and Michael Tilson Thomas, who became the Orchestra's first Music Director Laureate in 2020 following a 25-year tenure. In September 2020, acclaimed conductor and composer Esa-Pekka Salonen became the Symphony's 12th music director.

Many of the world's most prestigious conductors have been guests, including Leopold Stokowski, Leonard Bernstein and Sir Georg Solti, while an array of famed composers including Igor Stravinsky, Sergei Prokofiev, Maurice Ravel, Arnold Schoenberg, Paul Hindemith, Aaron Copland and John Adams have also collaborated with the orchestra. Popular programs have included orchestral performances paired with films and a joint concert with Metallica to mark the opening of the Chase Center in September 2019, which also marked the anniversary of the 1999 concert by the Symphony and Metallica captured in a Grammy-winning album. Symphony recordings have won numerous national and international awards, including eight Grammy Awards garnered by the Symphony's in-house record label SFS Media. Continuing to break new ground, the Symphony has also been honored 19 times by the American Society of Composers for its adventurous programming. In a typical year, more than 450,000 people attend over 220 performances, including 75,000 schoolchildren who attend free concerts at Davies Hall.

Outside its performance schedule, the Symphony supports an array of active educational and community programs. Its Adventures in Music (AIM) program brings music and supporting curricula to every child in grades 1–5 in the San Francisco Unified School District; the student experience is capped by a private concert in Davies Hall. Each year, the Concerts for Kids program, begun in 1919, brings music and supporting study material to more than 35,000 K–9 students in the greater Bay Area, while the Music and Mentors program brings professional mentors into middle and high schools throughout the city to coach students free of charge; instrumental and musical supplies are provided when needed, and tickets to Symphony and Youth Symphony concerts are also provided free. An interactive online music education resource for children and families, sfkids.org, was launched in 2002. Teachers and K–9 students are welcomed to open rehearsals, with pre-performance talks and doughnuts provided.

Considered one of the finest youth ensembles in the world, the 39-year-old San Francisco Symphony Youth Orchestra (SFSYO) provides pre-professional tuition-free training for young musicians, with weekly coaching by Symphony musicians; practicing on Saturdays and playing four concerts each year in Davies Hall, the SFSYO has staged eleven international tours, playing to packed houses in many of Europe's and Asia's leading concert houses.

Through other community programs, the Symphony has stepped in with free concerts in times of difficulty: following the Loma Prieta earthquake, playing to 20,000 people in Golden Gate Park; in September

2011 for an audience of 10,000 in Civic Center Plaza; and in a benefit concert in Davies Hall in November 17 following the devastating North Bay fires. Media has been an important part of its outreach efforts. In 2006, the Symphony launched Keeping Score, a multimedia program designed to make classical music more accessible to people of all ages, which included a national PBS television series seen by more than six million people, an interactive website, and a national radio series hosted by Michael Tilson Thomas—all of which can be accessed online at no cost through its YouTube channel. The Symphony’s use of new technology dates back to 1926, when it became the first orchestra in the United States to deliver regular radio broadcasts; today it is heard on nearly 300 radio stations across the country.

The latest innovation in community outreach is Currents, a series of digital narratives and music launched in the summer of 2020, which explores the cross-cultural music experience. The first four episodes in the series explored the pipa (a Chinese traditional instrument) and the role of Chinese culture in the Bay Area; jazz; Mexico’s musical culture; and Oakland’s hip hop culture. Symphony CEO Mark Hanson believes that “Currents will help to attract new audiences. It’s a programmatic shift that will help the organization become more relevant to communities in the Bay Area.”





SFFILM

SFFILM (the San Francisco International Film Festival), held for 14 days every April, is the longest-running film festival in the Americas and a major cultural event in the Bay Area. Sixty thousand viewers normally attend festival screenings and another 25,000 attend screenings held throughout the year. Vast in scope, the 2020 festival, before its cancellation due to COVID, included 254 films from 45 countries in 50 languages, 11 U.S. premieres, and presentations of 11 SFFILM-supported films. Screenings normally take place in venues across the city, including the Castro Theater, Roxie Theater, Grand Lake Theater (in Oakland), Victoria Theater, Dolby Theater, YBCA, and San Francisco Museum of Modern Art. Over the last 15 years, SFFILM's programming has expanded to include other annual film series, including Hong Kong Cinema and Doc Stories (a weekend long event presenting notable documentaries of that year). The Hollywood Reporter has observed that "Few Festivals are more suited to their city than the San Francisco International Film Festival."

While most of the SFFILM's impact is focused in the Bay Area (it operates more as an "exhibition festival" than a "marketplace festival" like Sundance where films are bought and sold), it attracts film industry professionals to visit the Bay Area annually. With as many as 15 world premieres, agents and distributors can find and acquire new releases. More importantly, through its programs SFFILM helps filmmakers in the Bay Area to develop their careers by connecting them to the larger film industry, and through its Residency Program and robust grants serves as an incubator for local films, with the goal of highlighting the Bay Area as an established and significant film hub.

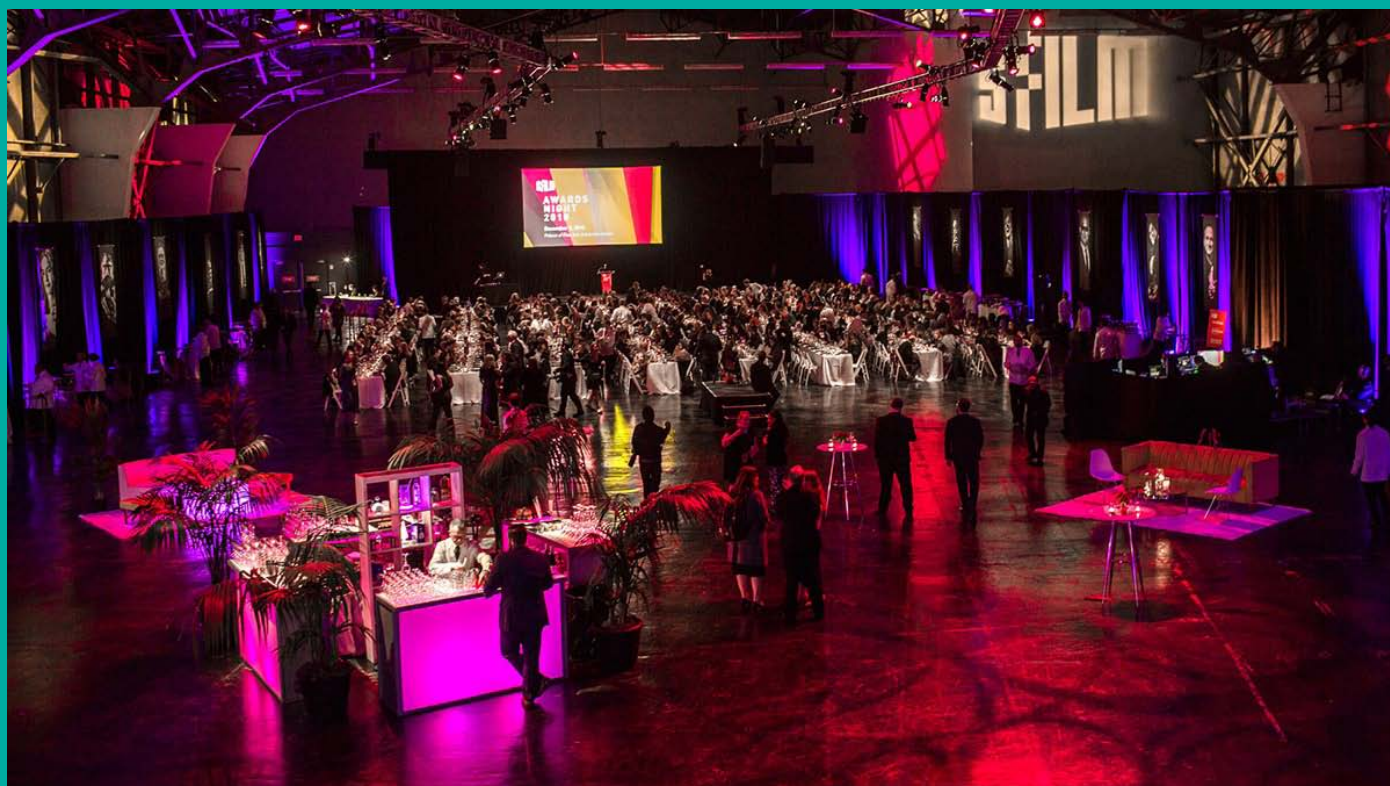
One noteworthy example is the acclaimed *Last Black Man in San Francisco*; its director, Joe Talbot, had participated in SFFILM's Youth Works program, later in his career was supported by SFFILM's residency and grant programs, and ultimately shared his debut feature with the Bay Area through an SFFILM hosted premiere. Other acclaimed Bay Area films supported by SFFILM include *Fruitvale Station*, *Blindspotting*, and *Sorry to Bother You*.

Year-round, SFFILM also supports a highly developed schedule of industry and similar educational programs. These include Filmmaker Grants (which provides funding and artistic development for fiction and documentary filmmakers); Filmmaker Residencies (which offer Bay Area based documentary and narrative filmmakers artistic guidance, office space, access to a creative community, and mentorship from established industry professionals); SFFILM FilmHouse (which hosts events throughout the year for the region's independent filmmaking community including filmmaker panels, work in progress screenings, live script readings, guest speakers from across the country, and networking connections); Schools at the Festival (which connects the festival to the local educational community by introducing students aged 6–18 to international films and the art of filmmaking); the Schools at the Festival Student Essay Contest (which works to cultivate critical thinking and creative writing skills); Filmmakers in the Classroom (which delivers on-site professional development for teachers in grades 4–12 who are looking to integrate media into the classroom); and the Young Filmmakers Camp (where students can learn either starting or more advanced filmmaking skills). Managing Director

Elizabeth O'Malley explains that "By exposing younger people to film we have an opportunity to develop our youth into cultural citizens."

Beyond its support for the development of a Bay Area film industry, SFFILM attracts to its Film Festival 85,000 annual visitors, who provide a significant economic

stimulus to the neighborhoods where screenings are held, particularly restaurants and other venues in the Castro, the Mission, and the Market Street Corridor. Filmmakers are housed at local hotels, primarily on Market Street and in SoMa. In addition to core staff, approximately thirty temporary workers are hired during the Festival.





SFJAZZ

“One of the great jazz concert halls in the world”
— The Guardian, London

The SFJAZZ Center, in the performing arts district surrounding Hayes Valley and the Civic Center, is one of the nation’s and the world’s leading centers for jazz performance. Its \$64 million, 35,000 square foot home on Franklin Street, opened in 2013, is the first freestanding facility in the United States built specifically for jazz performance and education and houses the nonprofit organization SFJAZZ. Building on San Francisco’s jazz roots dating back to when the Fillmore District was a magnet for artists and performance, since 1983 SFJAZZ has hosted the San Francisco Jazz Festival, which achieved a permanent home when the center opened. SFJAZZ now presents over 450 performances at the Center and around the Bay Area annually, featuring many of the world’s leading jazz artists.

SFJAZZ has a diverse educational program that includes field trips to the Center and hands-on learning programs in San Francisco and Oakland public and charter middle schools, led by jazz professionals and totaling more than 25,000 hours of instruction per year. Three thousand tickets to concerts are donated annually to schools and community groups. Jazz in the Middle sends jazz musicians into middle schools for instruction on the music and its history; School Day Concerts offers free performances for K–12 students in the Center’s Robert N. Miner Auditorium and off-site at schools; Jazz in Session works with public schools to strengthen music instruction; and the Oakland Public Conservatory of Music–SFJAZZ Partnership particularly focuses on opportunities for middle and high school students of color. The SFJAZZ High School All-Stars, a long-running program, auditions many of the best young jazz players in the Bay Area to create a performing ensemble that consistently wins awards.



SFMOMA

SFMOMA (the San Francisco Museum of Modern Art) constitutes one of the great collections of Modern Art in the United States, with more than 30,000 artworks. Dedicated to supporting and collecting the works of California artists and those active in the Bay Area in particular, its collections span architecture and design, sculpture and painting, media arts, photography and film. In addition to a wide range of special exhibits, major holdings include works by noted artists Wayne Thiebaud, Henri Matisse, Georgia O’Keeffe, Richard Diebenkorn, Frida Kahlo, Andy Warhol, Ruth Asawa, Richard Serra, Alexander Calder and Roy Lichtenstein. At the core of its holdings is the Fisher Collection, a world-famous private collection which was donated to the museum by

the Gap’s founders Don and Doris Fisher. Another major SFMOMA focus, photography, is based in the Pritzker Center for Photography, the largest space permanently dedicated to photography by any museum in the United States. The Museum’s holdings and public spaces are housed in adjoining landmark buildings designed by Mario Botta and award-winning Norwegian architectural firm Snøhetta.

Educational programs sponsored by SFMOMA reached approximately 10,000 students in 2019, primarily through the Museum’s Koret Visitor Education Center and partnerships with the San Francisco Unified School District and the San Francisco Public Library.



San Francisco Performances

Founded in 1979, San Francisco Performances has for more than forty years brought world renowned solo and chamber performers to San Francisco, filling a need for more intimate concerts and solo performances than are available through larger formats such as the Symphony or Opera. In the intervening years, SF Performances has introduced Bay Area audiences to artists such as Yo-Yo Ma, the Juilliard String Quartet, violinist Anne-Sophie Mutter, soprano Dawn Upshaw, Philip Glass, Andre Watts, and the Paul Taylor Dance Company, with presentations ranging from classical chamber groups to contemporary dance and jazz. Some are mid-career, but many are young emerging artists. Each year 40–50 main stage events are presented in the organization’s Civic Center home, the Herbst Theatre.

SF Performances’ reach into the community includes a unique, multi-year Resident Artists Program that was initiated in 1989 in partnership with San Francisco State University. The first residency was by the

Alexander String Quartet, which has continued its association with SF Performances to the present. Popular outreach programs include a Saturday morning series, now in its 25th year, that combines talks with performances. SF Performances now supports as many as three residencies at a time, each lasting several weeks—usually in the fall and spring—with a full residency extending 2–3 years. Partnerships with Bay Area schools that through the residencies place established and emerging artists in classrooms have helped to make SF Performances’ residency program one of the most recognized arts education programs in the country.

Other community outreach programs include a partnership with Community Access Ticket Services (CATS) which makes free tickets available through veterans communities, homeless agencies, women’s and children’s services agencies, and new immigrant organizations. Twenty to thirty CATS ticket recipients attend each performance.



Stern Grove Festival

One of the oldest and largest free music festivals in the world, Stern Grove Festival marked its 83rd year in 2020. Land for the Grove was contributed to the city in 1931 by Rosalie Stern in memory of her husband Sigmund Stern, a prominent civic leader, on the stipulation that concerts there be free to the public. The Grove was dedicated in 1932 with a concert by the San Francisco Symphony, and in 1938 the nonprofit organization, Stern Grove Festival Association, was formed to produce an annual concert series. Since then, Stern Grove Festival has operated as a public-private partnership, with the City maintaining the park and providing other infrastructure, while management, fundraising and programming of the Festival are handled by the Stern Grove Festival Association.

Ten outdoor shows are presented on ten consecutive Sundays each summer, with an average attendance of 7,500 (75,000 for the year). Offerings range from classical performing arts, with annual performances by the San Francisco Symphony and San Francisco Ballet, to rock, jazz, hip hop, and global music. Local Bay Area performers are given priority to be opening acts, offering them the opportunity of a big stage, while national touring acts representing different genres serve as headliners. Prominent artists such as Smokey Robinson, Carlos Santana, Janelle Monáe, and Bonnie Raitt have performed at the Festival, which aims to appeal to as broad an audience as possible.

Stern Grove Festival also runs an active music and dance educational program, which serves about 3,000 children every year. Programming takes place at the Grove, in community centers, schools, parks, or Boys and Girls Clubs throughout the city. Particular efforts are made to reach those who are less affluent or may not have access to music education. Offerings range from short classes

to longer-term artist residencies and include drumming, singing, dance, and basic music instrumentation. Director Bob Fiedler notes that “Music is a common language and common thread that’s universal. Part of our goal is to bridge cultural gaps and bring people together.”

With a budget of nearly \$3 million, Stern Grove Festival has a core group of eight staff members who work year-round. During the summer, the staff grows to approximately 100 employees. Financial support comes from a fairly even split of individual contributions, foundations, corporate sponsorships, and earned revenue. Government grants help round out the funding stream.

During concert performances, resources flow to the economy through on-site commerce (food sales and merchandise booths). Tens of thousands of dollars are spent per show on items such as sound equipment, instrument rental, and other festival infrastructure. A partnership has also developed with businesses and the merchants association of the nearby West Portal community, driving business to local shops and restaurants on concert days. Over 40% of concert attendees come from outside San Francisco, leading to new spending in the city. Artists with a large following also attract patrons from other parts of California and nationally.

A 2015 report by the City of San Francisco found that in 2014 visitor spending at Stern Grove totaled \$6.3 million; of that, 14% occurred at the event itself, and the remaining 86% at other local establishments. Including indirect and induced spending, total visitor impact was estimated to be \$12.1 million, including \$2.7 million at retail establishments, \$2.3 million at restaurants, and \$970,000 at hotels.



Theatre Bay Area

With more than 400 companies in its nine counties, the San Francisco Bay Area is the third largest theater center in the country after New York City and Chicago. The region has more theater companies per capita than almost any other metropolitan area in the U.S. and is home to the third largest community of Equity (union) actors. Some 200 new plays are premiered in the region each year.

A 45-year-old nonprofit membership organization, Theatre Bay Area supports the Bay Area's theater community with a shared infrastructure of services. Almost 2,000 individual artists and 275 theater companies participate, including large companies such as A.C.T. and small community theaters in the suburbs. At its heart, Theatre Bay Area connects actors with opportunities, principally through auditions that

connect talent to jobs. It also provides professional development support for actors and administrators, and grants of \$3,000–5,000 for projects. A Director's Residency program trains regional theater directors who aspire to become artistic directors of nonprofit theater companies, preparing them to step into artistic leadership positions; after a selection process three directors are placed in theaters for residencies over 12 months, during which they are mentored by the artistic director and have at least one opportunity to direct a significant project. Theatre Bay Area hosts an annual conference, and each year the TBA Awards program recognizes excellence in Bay Area theater. Advocacy for arts organizations is another part of its mission; the immediate priority is to work with government to develop re-opening guidelines that are appropriate for theaters.

Arts Districts

Arts organizations often cluster in arts or cultural districts. With fluid boundaries, they often include an anchor public or private institution, studios, galleries, nonprofit organizations, small retail, the offices of companies or individuals working in creative industries, and local services such as bars or restaurants. Some focus on a particular theme such as fashion or design. Inclusive by nature, their impacts are often manifested in a sense of culture and community, and a heightened level of urban vibrancy.¹⁵

San Francisco is home to at least four important arts districts: Civic Center/Hayes Valley, SoMa, the Mission, and Dogpatch. San Francisco Travel specifies three additional districts: Union Square, Fillmore/Japantown, and Golden Gate Park, maps of which can also be accessed on its website.¹⁶

Civic Center/Hayes Valley

The Civic Center/Hayes Valley district is home to the San Francisco War Memorial & Performing Arts Center, the San Francisco Conservatory of Music, and SFJAZZ, all of which help to support a wide array of restaurants, bars, and retail establishments in the vicinity. This makes Hayes Valley a popular destination for city and Bay Area residents as well as tourists.

In 2019, total annual expenditures by nonprofit arts organizations in the Civic Center/Hayes Valley neighborhoods were \$256 million, the largest total expenditure by neighborhood in San Francisco.



- 1 City Hall Tours**
1 Dr. Carlton B. Goodlett Pl., SF 94102, 10 a.m., 12 p.m. & 2 p.m., (Mon-Fri), 415-554-6139, sfgov.org/cityhall/city-hall-tours
- 2 San Francisco Symphony**
201 Van Ness Ave., SF 94102, 10 a.m.-6 p.m. (Mon-Fri), 12-6 p.m.(Sat) (Box Office), 2 hours prior to concerts (Sun), 415-864-6000, sfsymphony.org
- 3 San Francisco Ballet**
301 Van Ness Ave., SF 94102, 10 a.m.-4 p.m. (Mon-Fri) (Tickets), 415-861-5600, sfballet.org
- 4 San Francisco Opera**
301 Van Ness Ave., SF 94102, 10 a.m.-5 p.m. (Mon), 10 a.m.-6 p.m. (Tue-Fri) (Box Office), 415-554-6139, sfopera.com
- 5 SF Arts Commission Gallery | Main Gallery**
War Memorial Veterans Building Lobby 401 Van Ness Ave., SF 94102, 11 a.m.-6 p.m. (Mon-Fri), 415-252-2244, sfartscommission.org
- 6 SF Arts Commission Gallery | Cafe Vallor**
War Memorial Veterans Building Lobby 401 Van Ness Ave., SF 94102, 7-30 a.m.-4 p.m. (Mon-Fri), 415-252-2244, sfartscommission.org
- 7 SFAC Galleries - Art at City Hall**
1 Dr. Carlton B. Goodlett Pl., Ground Floor, SF 94102, 8 a.m.-8 p.m. (Mon-Fri), 415-252-2244, sfartscommission.org
- 8 Asian Art Museum**
200 Larkin St., SF 94102, 10 a.m.-5 p.m. (Tue-Sun), 415-581-3500, www.asianart.org
- 9 SFJAZZ Center**
201 Franklin St., SF 94102, 11 a.m.-5:30 p.m. (Tue-Sat), 866-920-5299, sfjazz.org
- 10 Orpheum Theatre**
1192 Market St., SF 94102, 11 a.m.-7:30 p.m. (Tue-Sat), 11 a.m.-3 p.m. (Sun), 888-746-1799 (Box Office), broadwayjst.com
- 11 CounterPulse**
80 Turk St., SF 94102, 10 a.m.-6 p.m. (Mon, Wed-Fri), 415-626-2060, counterpulse.org
- 12 City Arts and Lectures | Sydney Goldstein Theater**
275 Hayes St., SF 94102, 415-392-4400, cityarts.net
- 13 City Arts and Lectures | City Box Office - Ticketing**
180 Redwood St., Suite 100, SF 94102, 9:30 a.m.-5 p.m. (Mon-Fri), 12-4 p.m. (Sat), 415-392-4400, cityarts.net
- 14 A.C.T.'s Strand Theatre**
1127 Market St., SF 94103, 10 a.m.-4 p.m. (Mon-Fri), 415-749-2228 (Box Office), act-sf.org
- 15 Alonzo King LINES Ballet Dance Center**
26 Seventh St., SF 94103, 415-863-3040 (Box Office), linesballet.org
- 16 New Conservatory Theatre Center**
25 Van Ness Ave., SF 94102, 415-861-8972 (Box Office), www.nctcsf.org
- 17 San Francisco Conservatory of Music**
50 Oak St., SF 94102, 10 a.m.-12:30 p.m., 1:30-4 p.m. (Mon-Fri), 415-503-6275 (Box Office), sfcm.edu
- 18 SAFEhouse Arts**
145 Eddy St., SF 94102, Hours vary, 415-518-1517, safehousearts.org
- 19 Gallerie Wendi Norris**
8 Octavia St., SF 94102, 11 a.m.-6 p.m. (Mon-Fri), 415-346-7812, galleriewendinorris.com

Dogpatch

A former industrial neighborhood located between Potrero Hill and the Bay, Dogpatch has emerged as a new arts district in the last decade. This started with the conversion of the block-long American Industrial Center, a former soup factory, to a low-cost shared facility for arts and creative organizations. The Museum of Craft and Design and the Minnesota Project, another shared arts space, are located nearby, as are a mix of restaurants and breweries. Other district residents include the San Francisco Center for the Book, a nonprofit focused on books and bookmaking that hosts artists, workshops and exhibitions; Letterform Archive, with its collection of more than 60,000 items related to

typography, calligraphy and graphic design; and Public Glass, San Francisco's only public access glass art studio and school. In recent years, private art galleries have relocated from Union Square to Dogpatch in search of affordable space. At its west end, the district will be anchored by the new campus of the California College of the Arts, and at the east end by the Pier 70 project, which is converting a historical ironworks and shipyard into office, arts, and public space that will incorporate maker spaces and affordable artist's studios.

In 2019, nonprofit arts and cultural organizations in Dogpatch had nearly \$10 million in annual expenditures.



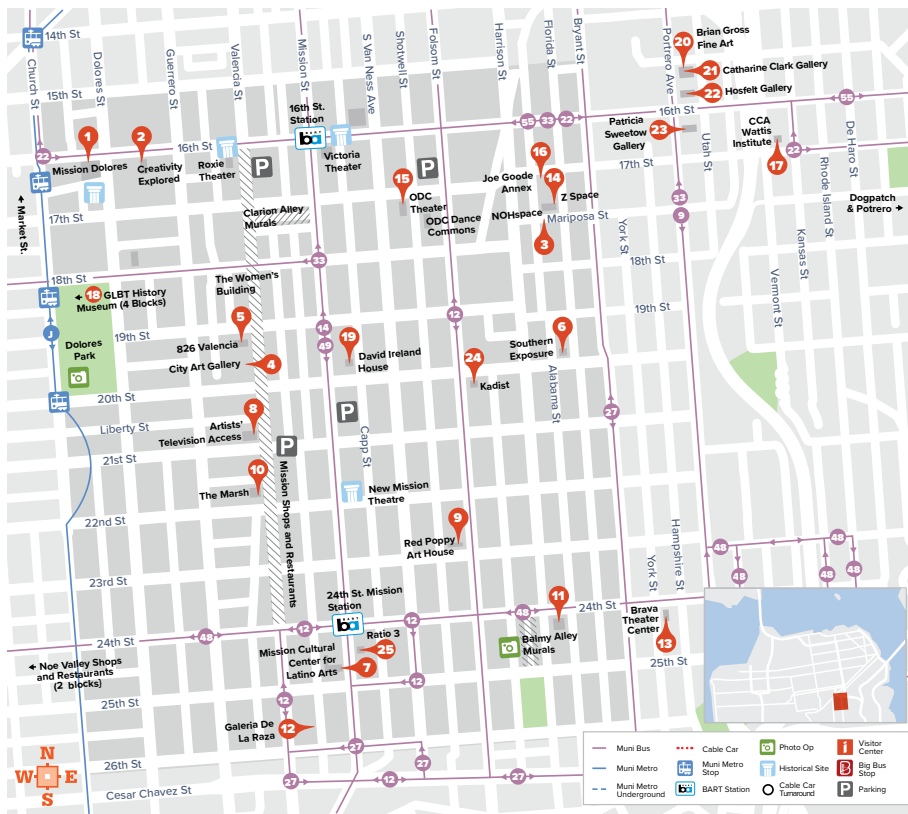
- 1 Museum of Craft and Design**
2569 Third St., SF 94107, 11 a.m.-6 p.m. (Tues-Sat), 12-5 p.m. (Sun), 415-773-0303, sfmcd.org
- 2 Minnesota Street Project**
1275 Minnesota St., SF 94107, 11 a.m.-6 p.m. (Tues-Sat) Gallery's days & times vary, 415-223-0825, minnesotastreetproject.com/
- 3 Minnesota Street Project with McEvoy Foundation for the Arts**
1150 25th St., SF 94107, 11 a.m.-6 p.m. (Tues-Sat) Gallery's days & times vary, 415-580-7605, minnesotastreetproject.com/
- 4 Workshop Residence**
7797 22nd St., SF 94107, 12-6 p.m. (Wed-Sat), 415-285-2050, workshopresidence.com
- 5 Dependable Letter Press/Negative Space Gallery**
1192 Illinois St., SF 94107, 9 a.m.-5 p.m. (Mon-Fri), Gallery evening hours vary, 415-503-0981, dependableletterpress.com/negative-space-gallery
- 6 The Midway Gallery**
900 Marin St., SF 94124, Gallery hours vary, themidwaysf.com
- 7 Romer Young Gallery**
1240 22nd St., Ground Floor, SF 94107, 11 a.m.-5 p.m. (Thu-Sat) Tue/Wed by appointment, 415-550-7483, romeryounggallery.com
- 8 Ampersand International Arts**
1001 Tennessee St., SF 94107, 12-5 p.m. (Thu/Fri during exhibitions), ampersandinternationalarts.com
- 9 Letterform Archive**
2339 Third St., 4R @ 20th St., SF 94107. Open by appointment, 8415-802-7485, letterformarchive.org
- 10 Museum of Performance + Design**
2220 Jerrold Ave., SF 94124, 1-6 p.m. (Tue-Fri), 1-5 p.m. (First Saturday of the month), 415-741-3531, mpdsf.org

The Mission District

San Francisco's Mission District, more commonly referred to as the Mission, is an eclectic urban neighborhood with Latinx roots. Filled with vibrant street murals, taquerias, live music clubs, performing venues, and art galleries, the Mission is a popular destination for tourists and residents, and in particular, younger crowds. Latinx artistic and cultural organizations based in the Mission, such as the Brava Theater Center and Galeria de la Raza on 24th Street, reflect the neighborhood's cultural traditions. The Mission is also home to the Roxie Theater, which is the oldest operating movie theater in San Francisco and serves as home to film festivals throughout the year. Festivals and parades are also part of the

neighborhood's rich culture, including celebrations such as Carnaval, which occurs every Memorial Day weekend.

In 2019, the total annual expenditure by nonprofit arts and cultural organizations in the Mission totaled nearly \$22 million.



- 1 Mission Dolores Basilica / Mission San Francisco de Asis**
3321 16th St., SF 94114, 9:30 a.m.-4:00 p.m. (Sun-Fri), 9 a.m.-4 p.m. (Sat), 415-621-8203, missiondolores.org
- 2 Creativity Explored**
3245 16th St., SF 94103, 10 a.m.-5 p.m. (Mon-Fri), 10 a.m.-7 p.m. (Thu), 12-5 p.m. (Sat), 415-863-2108, creativityexplored.org
- 3 Theatre of Yugen**
2840 Mariposa St., SF 94110, Hours vary, 415-621-0507, theatreofyugen.org/
- 4 City Art Gallery**
828 Valencia St., SF 94110, 12-9 p.m. (Sun, Wed, Thu), 12-10 p.m. (Fri, Sat), 415-970-9900, cityartgallery.org
- 5 826 Valencia**
828 Valencia St., SF 94110, 9:30 a.m.-6 p.m. (Daily), 415-642-5905, 826valencia.org/
- 6 Southern Exposure**
3030 20th St., SF 94110, 12-6 p.m. (Tue-Sat), 415-863-2141, soex.org
- 7 Mission Cultural Center for Latino Arts**
2868 Mission St., SF 94110, 10 a.m.-5 p.m. (Tue-Sat), 415-821-1155, missionculturalcenter.org
- 8 Artists' Television Access**
392 Valencia St., SF 94110, 1-11 p.m. (Sun-Thu), 1 p.m.-12 a.m. (Fri, Sat), 415-824-3890, atascite.org
- 9 Red Poppy Art House**
2698 Folsom St., SF 94110, 9 a.m.-12 p.m. (Mon-Thu), 7-10 p.m. (Fri, Sat), 650-731-5383, redpoppyarthouse.org
- 10 The Marsh**
1062 Valencia St., SF 94110, 1-4 p.m. (Mon-Fri), 415-282-3055 (Box Office), themarsh.org
- 11 Precita Eyes Mural Arts & Visitors Center**
2981 24th St., SF 94110, 10 a.m.-5 p.m. (Mon-Fri), 10 a.m.-4 p.m. (Sat), 12 p.m.-4 p.m. (Sun), 415-285-2287, precitayeyes.org
- 12 Galeria De La Raza**
1470 Valencia St., SF 94110, 12-6 p.m. (Wed-Sat), 415-826-8009, galeriadelaraza.org
- Brava Theater Center**
2781 24th St., SF 94110, Hours vary, 415-641-7657, brava.org
- 14 Z SPACE**
450 Florida St., SF 94110, Hours vary, 415-626-0453, zspace.org
- 15 ODC Theater**
3153 17th St., SF 94110, Hours vary, 415-863-6606, odc.dance
- 16 Joe Good Performance Group**
401 Alabama St., SF 94110, 9 a.m.-5 p.m. (Mon-Fri), 415-561-6565, joejoe.org
- 17 CCA Wattis Institute**
360 Kansas St., SF 94103, 12-6 p.m. (Tue-Sat), 415-355-9670, wattis.org
- 18 The GLBT Historical Society Museum**
4127 18th St., SF 94114, 11 a.m.-6 p.m. (Mon-Sat), 12-5 p.m. (Sun), 415-621-1107, glbthistory.org
- 19 The David Ireland House**
500 Capp St., SF 94110, Artist guided tours: 11 a.m., 2 p.m. and 4 p.m. (Wed, Thu, Fri), Self-guided tours: 12-5 p.m. (Sat), 415-872-9240, 500cappstreet.org
- 20 Brian Gross Fine Art**
248 Utah St., SF 94103, 10:30 a.m.-6 p.m. (Tue-Sat), 415-788-1050, briangrossfineart.com/
- 21 Catharine Clark Gallery**
248 Utah St., SF 94103, 10:30 a.m. - 5:30 p.m. (Tue-Fri), 11 a.m.-6 p.m. (Sat), 415-399-1439, cclarkgallery.com/
- 22 Hosfelt Gallery**
260 Utah St., SF 94103, 10 a.m.-5:30 p.m. (Tue-Sat), 415-495-5454, hosfeltgallery.com/

Yerba Buena

Yerba Buena, located in the SoMa district south of Market Street, is home to the San Francisco Museum of Modern Art (SFMOMA), the Museum of the African Diaspora (MOAD), the Contemporary Jewish Museum, the exhibit and performing arts spaces of Yerba Buena Gardens, and soon the Mexican Museum. Centrally situated near offices and public transit, Yerba Buena also

boasts an active bar and restaurant scene and is closely linked to the tourism and hospitality industry by virtue of its proximity to convention activity at Moscone Center.

In 2019, nonprofit arts and cultural organizations in Yerba Buena had expenditures of over \$115 million.



- 1 San Francisco Museum of Modern Art (SFMOMA)**
151 Third St., SF 94103, 10 a.m.-5 p.m. (Fri-Tue), 10 a.m.-9 p.m. (Thu), Show starts at 8 p.m., 415-357-4000, sfmoma.org
- 2 Contemporary Jewish Museum**
736 Mission St., SF 94103, 11 a.m.-5 p.m. (Sun-Tue, Thu-Sat), 11 a.m.-8 p.m. (Third Thursday of the month), 415-655-7800, theqjm.org
- 3 Yerba Buena Center for the Arts**
701 Mission St., SF 94103, 11 a.m.-6 p.m. (Tue, Wed, Fri, Sat, Sun), 11 a.m.-8 p.m. (Thu), 415-978-2787, ybca.org
- 4 Museum of African Diaspora**
685 Mission St., SF 94105, 11 a.m.-6 p.m. (Wed-Sat), 12 p.m.-5 p.m. (Sun), 415-358-7200, moadst.org
- 5 SPUR Urban Center**
654 Mission St., SF 94105, 9 a.m.-5 p.m. (Mon-Fri), 415-781-8726, spur.org
- 6 California Historical Society**
678 Mission St., SF 94105, 11 a.m.-5 p.m. (Tue-Sun), 415-357-1848, californiahistoricalsociety.org
- 7 American Bookbinders Museum**
355 Clementina St., SF 94103, 10 a.m.-4 p.m. (Tue-Sat), 415-824-9754, bookbindersmuseum.org
- 8 Children's Creativity Museum**
221 Fourth St., SF 94103, 10 a.m.-4 p.m. (Wed-Sun), 10 a.m.-5 p.m. (Daily, Creativity Carousel), 415-820-3320, creativity.org
- 9 Intersection for the Arts**
1446 Market St., SF 94102, 10 a.m.-5 p.m. (Mon-Thu), 10 a.m.-2 p.m. (Fri), 415-626-2787, theintersection.org
- 10 Luggage Store Gallery**
1007 Market St., SF 94103, 12 p.m.-5 p.m. (Wed-Sat), 415-255-5971, luggagestoregallery.org
- 11 SF Camerawork**
1011 Market St., 2nd Fl., SF 94103, 12 p.m.-6 p.m. (Wed-Sat), 415-487-1011, sfcamerawork.org
- 12 Bindlestiff Studio**
185 Sixth St., SF 94103, Hours vary, 415-796-3848, bindlestiffstudio.org
- 13 111 Minna Gallery**
111 Minna St., SF 94105, 7 a.m.-5 p.m. (Mon-Fri), 415-974-1719, 111minnagallery.com

Fillmore/Japantown

With deep roots in the African-American community, the Fillmore neighborhood is home to venues such as Fillmore Auditorium that for decades have hosted jazz, blues and rock and roll luminaries. Japantown, which is immediately adjacent to the Fillmore district, is a center of Japanese culture in San Francisco and home to the

Japan Center, restaurants, and street and cultural events such as the annual Cheery Blossom Festival and the Nihonmachi Street Fair.



- 1 The Fillmore Auditorium**
1805 Geary Blvd., SF 94115, Doors open at 7 p.m., Show starts at 8 p.m., 415-346-3000, thefillmore.com
- 2 African American Historical and Cultural Society**
726 Fulton St., SF 94115, 1 p.m.-5 p.m. (Tue-Sat), 415-292-6172, sfaahcs.org
- 3 African American Art and Culture Complex**
762 Fulton St., SF 94102, 12 p.m.-5 p.m. (Tue-Sat), 415-922-2049, aaacc.org
- 4 St. John Will-I-Am Coltrane African Orthodox Church**
2097 Turk St., SF 94115, 12 p.m. (Sun), 415-673-7144, coltranechurch.org
- 5 National Japanese American Historical Society**
1684 Post St., SF 94115, 12 p.m.-5 p.m. (Mon-Fri), 12 p.m.-5 p.m. (First Saturday of the month), 415-921-5007, njaahs.org
- 6 Japantown Peace Plaza**
1610 Geary Blvd., SF 94115, Open 24 Hours Daily, 415-567-4573, sfjapantown.org
- 7 Japan Center**
22 Peace Plaza & 1737 Post St., SF 94115, 7 a.m.-12 a.m. (Daily), 415-440-1171, japancenter.com
- 8 Audium**
1616 Bush St., SF 94109, Doors open at 8 p.m., Show starts at 8:30 p.m. (Thu-Sat), 415-771-1616, www.audium.org
- 9 Patricia's Green**
Octavia Blvd. & Fell St., SF 94102, Open 24 hours Daily, 415-831-5500, sfrecpark.org/destination/patricias-green-in-hayes-valley
- 10 Haas-Lilienthal House**
2007 Franklin St., SF 94109, 12 p.m.-3 p.m. (Wed & Sat), 11 a.m.-4 p.m. (Sun), 415-441-3000, haas-lilienthalhouse.org

Golden Gate Park

Home to the California Mid-Winter Exposition of 1894, Golden Gate Park clusters many of the city's leading museums and cultural attractions including the de Young Museum, the California Academy of Sciences, the Japanese Tea Garden, and the Conservatory of

Flowers. It is also the setting for major outdoor music events attended each year by tens of thousands such as the Hardly Strictly Bluegrass Festival, Opera in the Park, and Outside Lands.

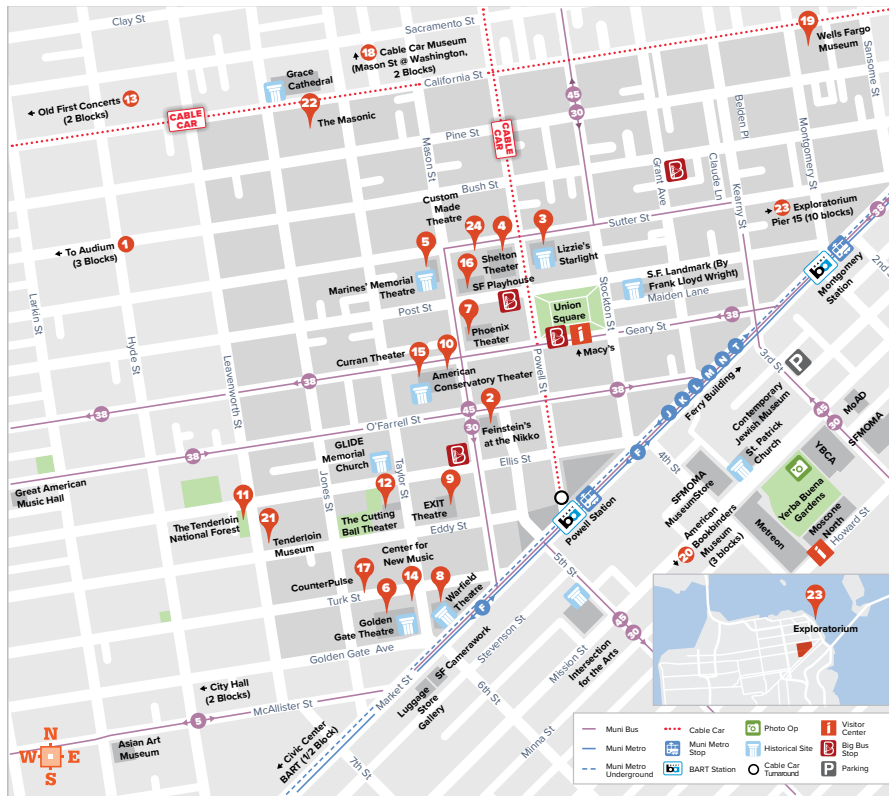


- 1 SF Botanical Garden at Strybing Arboretum**
1199 Ninth Ave., San Francisco 94122, 7:30 a.m.-5 p.m. (Oct-Nov., Feb-Mar), 7:30 a.m.-4 p.m. (Nov-Jan), 7:30 a.m.-6 p.m. (Mar-Sept), 415-661-1316, sfbg.org
- 2 Japanese Tea Garden**
75 Hagiwara Tea Garden Dr., SF 94118, 9 a.m.-4:45 p.m. (Nov-Feb), 9 a.m.-5:45 p.m. (March-Oct), 415-223-0825, 415-752-1171, japaneseteagardenst.com/
- 3 de Young Museum**
50 Hagiwara Tea Garden Dr., SF 94118, 9:30 a.m.-5:15 p.m. (Tue-Sun), 415-750-3600, deyoung.famsf.org
- 4 California Academy of Sciences**
55 Music Concourse Dr., SF 94118, 9:30 a.m.-5 p.m. (Mon-Sat), 11 a.m.-5 p.m. (Sun), 415-379-8000, calacademy.org
- 5 Conservatory of Flowers**
100 John F. Kennedy Dr., SF 94118, 10 a.m.-4:30 p.m. (Tue-Sun), 415-831-2090, conservatoryofflowers.org
- 6 Sharon Art Studio**
300 Bowling Green Dr., SF 94117, 10 a.m.-6 p.m. (Mon-Fri), 415-753-7006, sharonartstudio.org/
- 7 3 Fish Studios**
4541 Irving St., Ground Floor, SF 94122, 10 a.m.-6 p.m. (Mon-Sun), 415-242-3474, 3fishstudios.com
- 8 The Walt Disney Family Museum**
104 Montgomery St., SF 94129, 10 a.m.-6 p.m. (Daily, closed Tuesdays), 415-345-6800, waltdisney.org
- 9 Legion of Honor**
100 34th Ave., SF 94121, 9:30 a.m.-5:15 p.m. (Tue-Sun), 415-750-3600, legionofhonor.famsf.org

Union Square

Union Square anchors San Francisco's theater district with venues such as the Geary, Curran and Golden Gate theaters, Masonic Auditorium, and The Warfield.

Adjacent restaurants attract visitors and enrich the theater experience for patrons. The neighborhood is also home to numerous private art galleries.



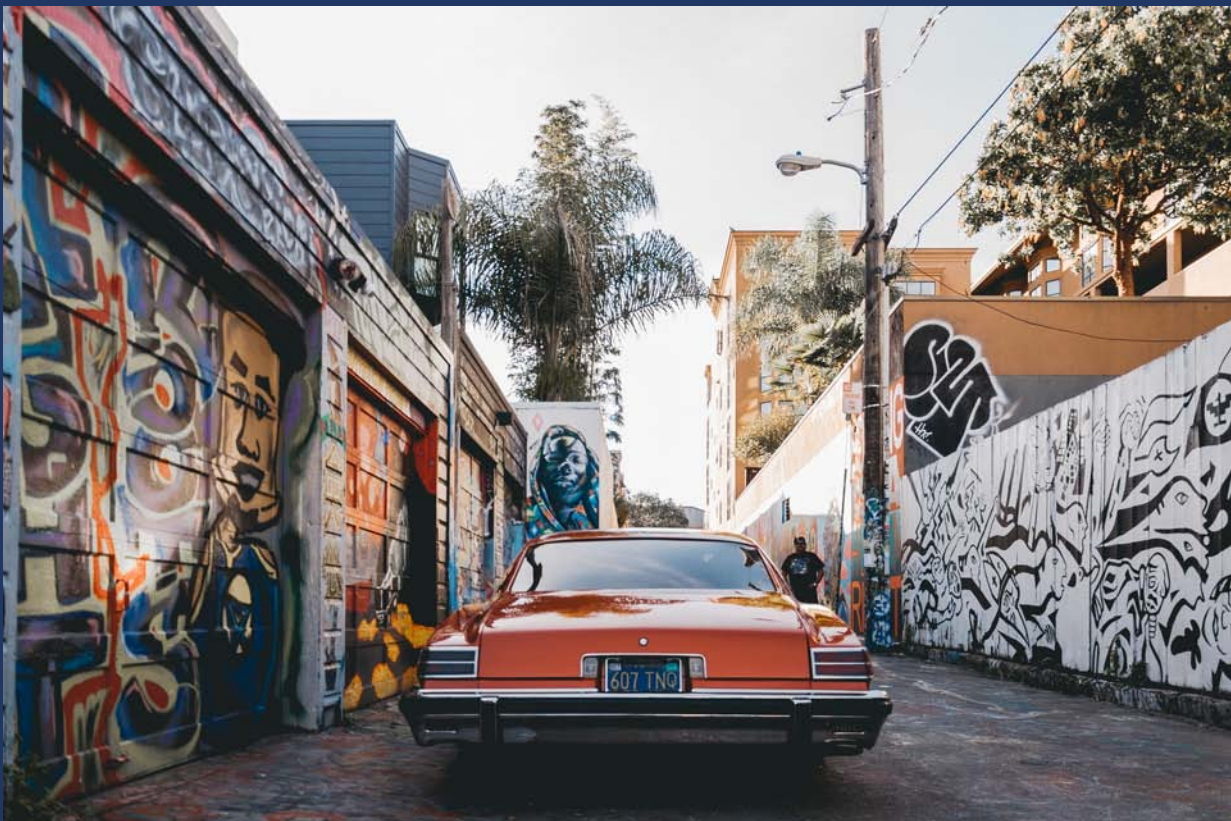
- 1 Audium**
1616 Bush St., SF 94109, Doors open at 8 p.m., Show starts at 8:30 p.m. (Thu-Sat), 415-771-1616, audium.org
- 2 Feinstein's at the Nikko**
222 Mason St., SF 94102, Hours vary, 866-663-1063, feinsteinsf.com
- 3 Lizzie's Starlight**
450 Powell St., SF 94102, 5 p.m.-12 a.m. (Wed & Thurs), 5 p.m.-2 a.m. (Fri & Sat), 1-8 p.m. (Sun), 415-392-8595, lizziestarlight.com
- 4 Shelton Theatre**
533 Sutter St., SF 94102, Hours vary, 415-882-9100, sheltontheatre.org
- 5 Marines' Memorial Theatre**
609 Sutter St., 2nd Fl., SF 94102, Hours vary, 415-447-0188, marinesmemorialtheatre.com
- 6 Golden Gate Theatre**
1 Taylor St., SF 94102, Hours vary, 888-746-1799, broadwaysf.com
- 7 Phoenix Theatre**
414 Mason St., SF 94102, Hours vary, 415-336-1020, phoenixtheatre.org
- 8 The Warfield**
982 Market St., SF 94102, Hours vary, 888-929-7849, thewarfieldtheatre.com
- 9 EXIT Theatre**
158 Eddy St., SF 94102, Hours vary, 415-931-1094, theexit.org
- 10 American Conservatory Theater**
405 Geary St., SF 94102, Hours vary, 415-749-2228, act-sf.org
- 11 The Tenderloin National Forest**
509 Ellis St., SF 94109, Call for hours, 415-255-5971, tuggagestoregalleries.org/tmf
- 12 The Cutting Ball Theater**
277 Taylor St., SF 94102, Hours vary, 415-292-4700, cuttingball.com
- 13 Old First Concerts**
1751 Sacramento St., SF 94109, Hours vary, 415-474-1608, oldfirstconcerts.org
- 14 Center for New Music**
55 Taylor St., SF 94102, 9 a.m.-5 p.m. (Mon-Fri), 415-275-2466, centerfornewmusic.com
- 15 Curran Theater**
445 Geary St., SF 94102, Hours vary, 415-358-1220, sfcurran.com
- 16 San Francisco Playhouse**
450 Post St., SF 94102, Hours vary, 415-677-9596, sfplayhouse.org
- 17 CounterPulse**
80 Turk St., SF 94102, 10 a.m.-6 p.m. (Mon, Wed-Fri), 415-626-2060, counterpulse.org
- 18 Cable Car Museum**
1201 Mason St., SF 94108, 10 a.m.-6 p.m. (Daily, Apr-Oct), 10 a.m.-5 p.m. (Daily, Nov-Mar), 415-474-1887, cablecarmuseum.org
- 19 Wells Fargo Museum**
420 Montgomery St., SF 94163, 9 a.m.-5 p.m. (Mon-Fri), 415-396-2619, wellsfargohistory.com
- 20 American Bookbinders Museum**
355 Clementina St., SF 94103, 10:30 a.m.-6 p.m. (Tue-Sat), 415-824-9754, bookbindersmuseum.org
- 21 Tenderloin Museum**
398 Eddy St., SF 94102, 10 a.m.-5 p.m. (Tue-Sun), 11 a.m.-6 p.m. (Sat), 415-351-1912, tenderloinmuseum.org
- 22 The Masonic**
1111 California St., SF 94108, Hours vary, 415-776-7457, sfmasonic.com
- 23 Exploratorium**
Pier 15, SF 94111, 10 a.m.-5 p.m. (Tue-Sun), 6-10 p.m. (Thu, Ages 18+), 415-528-4444, exploratorium.edu
- 24 Custom Made Theatre**
533 Sutter St., SF 94102, Hours vary, 415-798-2682, custommade.org

SPOTLIGHT

San Francisco Cultural Districts

In May 2018, a new element was added to San Francisco’s cultural landscape with the passage of legislation that formalized the creation of place-based, community-defined areas of the city as Cultural Districts. Proposition E, passed later that year, allocates approximately \$3 million annually from the city’s Hotel Tax Fund to support the Cultural Districts program. Districts designated to date include the African American Arts & Cultural District, American Indian Cultural District, Calle 24 Latino Cultural District, Castro LGBTQ Cultural District, Japantown

Cultural District, Leather LGBTQ Cultural District, SOMA Pilipinas Cultural District, and Transgender Cultural District. More directed to economic and social development goals than to the arts, each district is required to submit to the city a “Cultural History, Housing and Economic Sustainability Strategy Report” as a strategic plan to guide the district’s development. Foundational policy strategies include, however, historic/cultural preservation and arts and culture, suggesting that these districts could take on a growing arts-related role.¹⁷





3

The Arts and Creative Industries

Beyond their direct and indirect impacts on business revenues and employment, the arts can provide a pivotal underpinning for a city’s technology economy and particularly its creative industries. Those industries include sectors such as advertising, broadcasting, architecture, design, fashion, gastronomy, music and publishing, and video games. Together they serve as catalysts for innovation, driving metropolitan and regional competitiveness. According to one analysis, “Many advanced technologies can be replicated across the world using cheaper labor. But original artistic creation, innovative design and other higher-level creative work cannot be outsourced so easily.”¹⁸ UNESCO terms the creative economy “one of the most rapidly growing sectors of the world economy, but also a highly transformative one in terms of income generation, job creation and export earnings.”¹⁹

The creative economy embraces small and mid-sized companies founded by entrepreneurs who cluster in cities such as San Francisco, successfully aggregating talent at a scale that provides critical mass. While there are many drivers for this entrepreneurial clustering, the presence of a vibrant arts community is one. The world-famous design firm IDEO, for example, had its origins in two firms—ID Two, which moved from Palo Alto to North Beach in 1985, and DKD studio in Palo Alto. When IDEO was created through a merger in 1991, Palo Alto became the headquarters, but later nearly all of the design team moved to San Francisco, in large part due to its stronger cultural environment. While both offices are active, the nerve center of the company today is its

San Francisco office located on the Embarcadero. This speaks to the power of a vibrant arts culture to attract technological and creative talent and the dynamic of educated and highly mobile workers choosing where to live due to the availability of cultural opportunities that extend personal fulfillment beyond the workplace.

The linkage to arts particularly occurs through the crossover of ideas, especially in companies like Adobe and Pinterest that serve the creative community. Workers in digital arts often play outside roles in other arts. Recognizing that connection, while Silicon Valley companies continue to concentrate most of their employees and activity relating to hardware in the South Bay, many have in recent years established large footprints in San Francisco that particularly concentrate creative functions. Design often comes into play through the process of user interface and the experience of how people use and interact with technology—one that links art with engineering. Apple’s success can to a large degree be attributed to the willingness of Steve Jobs to give designers a seat at the product design table with engineers.

In San Francisco, the presence of an active arts sector has proven to be an important competitive advantage in the competition to attract and grow technology companies. By corollary, a diminution of the depth or extent of the sector can be expected to reduce that advantage, particularly in a post-COVID period when where workers live is less tied than in the past to where their employers are located.

“There is a clear relationship between having a vibrant and creative arts community and the ability to attract talent. It’s a core reason to invest in the arts.”

— Tim Brown, Chairman, IDEO

“It’s important that the art world partner with technology to make better tools that contribute to a better world. Design needs to be at the table with engineers early. Designers are trained to think about how tools impact people, asking ‘what do we want to do with this?’ Eighty percent of employees at tech companies are engineers and they have a lot to wrap their heads around, but the design perspective can be critical. One reason Steve Jobs was so successful at Apple was that he allowed designers to have such a powerful influence.”

— Stephen Beal, President,
California College of the Arts

“Burning Man culture provides a platform for experimentation and innovation, especially work that exists at the intersection of art and technology. We grew up with the tech community and the Internet. Members of our community were involved with The Well before the Internet. Many Burning Man community members and participants lead major tech companies, and Burning Man continues to influence the culture and ideas of the tech industry in San Francisco and Silicon Valley...Elon Musk once said ‘Burning Man is Silicon Valley,’ by which he meant you could not understand what drives Silicon Valley without understanding the creative spirit and innovative culture of Burning Man. Its collaborative culture has influenced open-source technologies, sharing apps, tech work culture, and commons-based peer production among others.”

— Stephen Ra\$pa, Associate Director of
Community Events, Burning Man

Dealing with the Impacts of COVID-19

COVID-19 has impacted the arts perhaps more than any sector due to the arts sector's dependence on live performances and visitors to museums and performance venues, which have been largely closed since March 2020. This is a national challenge, shared by arts organizations across the country. The Bureau of Economic Analysis estimates that in 2017 arts and culture industries organizations contributed \$877.8 billion to the national economy, or 4.5% of GDP.²⁰ Against this backdrop, losses in the arts sector have economic implications.

The National Independent Venue Association (NIVA), for example, notes that independent venues were the first to close in 2020 and will be the last to reopen, while in the meantime incurring ongoing costs such as rent and mortgage, loans, taxes, and insurance in the absence of revenue. For many, the burden of fixed costs makes even partial reopening infeasible. NIVA's polling suggests a \$9 billion loss in ticket sales alone, not including food or beverage revenue, if facilities stay closed through 2020. In those circumstances 90% of independent venues report that they may close permanently. Closed stages in turn impact artists, who earn 75% of their income from live performances.²¹

Another report by the Brookings Institution estimates that at the national level fine and performing arts organizations saw more than 1.4 million lost jobs and \$42.5 billion in lost sales in the April–July period—representing 50% of all jobs and more than a 25% of

all lost sales across creative industries. Of the 50 states, California was hit the hardest in terms of total losses for creative industries and occupations (a broader category that includes the arts), followed by New York.²²

In San Francisco, with its extended arts community, the impacts are major. The de Young Museum's exhibit *Frida Kahlo: Appearances Can Be Deceiving*, for example, which was expected to provide 15% of the year's total revenue, was closed the week of its opening in March 2020 and only reopened to limited visits in September. Live performances of San Francisco Ballet's *Nutcracker*, which in normal years account for 35–40% of annual ticket sales, were also canceled. The cancellation of shows and performance seasons across the board have impacted smaller venues as well. The Tony Award winning company TheatreWorks has repeatedly deferred its season, from July to October, and most recently to March 2021; the delay entails a 35% cut in the current year's budget.²³ Twenty-seven staff positions tied to events and programming were cut at the Yerba Buena Center for the Arts in July, with the remaining 45 staff members facing salary reductions of 5–12%.²⁴

Similar stories can be repeated across the range of arts organizations. Support from the federal government's Paycheck Protection Program has helped, but the program's expiration has renewed concerns over the long-term sustainability of many smaller arts organizations absent renewed federal assistance or a meaningful reopening in early 2021.

“Many don’t understand that the arts, including nonprofits, are a business. You need both earned and contributed income.”

**— Brad Erickson, Executive Director,
Theatre Bay Area**

The following sampling of nonprofit arts and cultural organizations in San Francisco suggests how the city’s many arts organizations have been affected and how they are adapting. Across the board, earned income has fallen. Contributed income has been less affected

but in many cases has fallen too. Program staff has in many organizations been cut or furloughed, and salaries reduced. This has particularly been the case since the end of the federal Paycheck Protection Program. Nearly all arts organizations have compensated for the lack of live performances or in-person visits by increasing digital programming and raising their online profile. While often providing exposure to new and larger audiences, the move online has not significantly compensated for the loss of ticket revenue or provided commensurate levels of income to artists.

COVID Case Studies

A.C.T.

Approximately 45% of the company’s revenue is earned and 50% is contributed, with the balance coming from its endowment. With its theaters closed due to COVID since March 2020, the company moved to free and ticketed virtual programming, with the 2020/2021/2022 season beginning with live stream and on demand performances. Since March, ticket sales have been hit hard and contributed income has fallen as well. Reflecting that, full time staff has been cut by 50% and all staff (including part-time and seasonal workers) by 77%. Educational and community programs have been moved fully online.

Alonzo King LINES Ballet

With COVID, the LINES dance studio was closed in March and the Ballet’s planned gala canceled. Since then, all programs have been virtual, with the HeART with LINES program, 2020 Summer Program, and Dance Center Classes moving online. The Dance with Parkinson’s program was suspended but brought back in the fall. Overall, the number of dance classes has been reduced. Some dancers have been furloughed but later brought back to work on virtual programs. The company has been sustained by continued support from individual donors and foundations and is pursuing new forms of funding. Managers are concerned, however, that donor support may fall off if in-person performances are not resumed by the summer of 2021 and programs remain virtual.

American Bach Soloists

With no performances held for 54 weeks, COVID has impacted operations and revenue. The 2020 Festival & Academy and the annual performances of Messiah, which normally generate 30% or more of annual revenue, were cancelled. Since the pandemic onset, ABS has been largely sustained by private donors; a virtual gala held in September was successful. Executive Director Don Scott Carpenter observes that while the budget was borderline the company came through 2020 intact but that the outlook for 2021 is uncertain. One concern is that donors who were generous in 2020 may not sustain that level of support. There will be some earned revenue from online events, but at significantly lower levels than live events. Available resources should enable ABS to get through its current fiscal year ending June 30, with budget scenarios after that based on either a return to normal or on a return to live performances but with limited seating. That limited amount of programming would enable the company to sustain itself through late summer, making it to the holiday performance season. Carpenter believes, however, that “If we can’t re-open venues, there’s a very real possibility that it will be the end of this organization. There will be a line in the sand that we just can’t get across.”

Another long-term concern is talent. Unlike the symphony, ABS doesn’t employ a permanent staff of musicians so wasn’t required to renegotiate contracts. It did in the initial stages of the pandemic, however, contribute 35% of the revenues it received to its artists,

and has subsequently paid featured artists to record short performances that are distributed by email and YouTube. These amounts are small, and the longer worry is that talent will leave the Bay Area. Carpenter reports that “Because of its high cost of living and of housing in particular, musicians—who are in the gig economy—are leaving. Some have given up performing and returned to live with their families and others have moved to less expensive places. Elizabeth Blumenstock, for example, one of the nation’s leading baroque violinists who performs with ABS, relocated to New Mexico. She will still perform here but will have to travel. Because it’s so difficult to re-enter the housing market once you leave, some may never return.”

Asian Art Museum

The museum’s budget FY 2021 budget (July-June) of \$21.4 million comes from contributions from foundations and individuals (\$9.7 million), the City of San Francisco for maintenance of the building and collections (\$10.7 million), and earned income from admissions and the café and store (\$1 million). Earned income has dropped sharply with COVID. Pre-COVID, rentals of the museum’s space for 55 separate events brought in an additional \$570,000. With visits suspended and the café and store closed, the museum’s overall budget decreased by \$4.1 million, or 13%, from FY 2020.

In response to the closure of its facilities to visitors, activity was shifted to online experiences offered through #MuseumFromHome. As of July 2020, engagement on social media platforms had increased by more than 50%, with Instagram use growing by 744% since the shelter-in-place took effect in mid-March 2020. Despite the loss of on-site visits, educational programs have also continued, including 5,000 packets sent to teachers in May for Asia Pacific American Heritage Month. The packets provide teachers with materials on often overlooked Asian art and artists, curricula, and materials that enable children to create art at home. The museum continues to deliver its programs online for all ages, including poetry workshops, a class led by a Zen Buddhist priest based in Japan, and a panel in which three Bay Area-based Asian-American women artists spoke about their practices. Other programs

engage Asian and other residents from the museum’s Tenderloin neighborhood and first-generation youth from Chinatown.

Brava! For Women in the Arts

Before COVID-19, Brava’s annual budget was \$1.2 million but has since fallen to approximately \$850,000. Approximately half the budget has normally come from earned income, the balance being contributed. The 285 days of on-site activity in 2019 have been reduced to zero since the theater closed in March 2020. In these circumstances, owning and maintaining a physical property with all its overhead is a particular challenge. Online programs began in May, with seven online projects being launched so far. Executive Director Anastacia Powers Cuellar said, “There’s a lot of loneliness out there. We’re trying to reach people so they’ll feel connected to something.” As a result of the fall in revenue, what was a staff of 10 full-time and 20 part-time has been reduced to a core of five. All earned revenue has been taken out of the current budget, and savings drawn down to keep the theater operational through June 2021. At the same time, the theater is providing a monthly stipend of \$300–500 to artists so they can have something to live off. As explained by Cuellar, “We’re trying to take care of people. We can’t afford for artists to leave the Bay Area. We’re nothing without our artists.”

Burning Man

Like other arts and cultural organizations, Burning Man has been impacted by COVID. In April, its 80,000 person event in Nevada’s Black Rock Desert was canceled, followed soon afterward by all remaining 2020 community events. The Global Arts Grant Program was also paused for 2020. As the majority of Burning Man’s revenue comes from tickets, the financial ramifications have been large. To conserve funds and reduce the budget, expenses have been cut dramatically and seasonal staff have been laid off. The organizers, however, have also taken the respite from event production as an opportunity to focus on other public programs and initiatives, including the development of a 10-year Sustainability Roadmap (a plan to handle waste ecologically and become carbon

negative by 2030) and Kindling, an online platform for live events and co-learning, which in its first five months has hosted 400 events with over 11,500 attendees. ArtSpeaks is a new storytelling series that gives artists the ability to showcase and discuss their work, including visits to studios and demonstrations of their fabrication processes. Another online education and capacity-building program currently under development will enable both Burners and non-Burners to directly exchange skills and knowledge.

California College of the Arts

With COVID closing the campus in March 2020, all instruction moved online, with 1,650 students actively engaged in virtual classes. While the school is continuing to offer a full program, 20% of 2020 courses were canceled or postponed and 220 (about 12%) out of close to 1,900 registered students declined or delayed their enrollments. All summer youth programs were canceled for 2020. The most significant financial hit has been to housing and food services, with the pandemic affecting the on-campus resident population during both the 2020 spring and fall semesters. While construction on Founders Hall, which was already in progress, was able to be completed, the groundbreaking for the new campus's teaching facilities, originally planned for April 2020, has been postponed.

Carnaval San Francisco

Carnaval's income comes from a mix of sponsorships, grants, contributions, and the sale of vendor spaces. COVID has had a major impact. The parade, which normally takes place in May was initially postponed three months to Labor Day weekend and then canceled. That devastated the budget, as there was no vendor revenue, and revenue from sponsorships was reduced. Adapting to the situation, the organizers instead repurposed the event's infrastructure to community service by creating the Mission Food Hub, with food and warehouse space donated by Carnaval sponsors. Five hundred families showed up in May, which has since then spurred the program's growth to grocery

distribution service three days a week, serving as many as 7,000 families. The groceries distributed are chosen to be culturally appropriate to the Latinx community, driven by what people waiting for food say they want and need (for example, on Mexican Independence Day boxes were distributed containing all the ingredients required to make enchiladas.) Sixty percent of those volunteering at the Hub were once in the food lines. Related initiatives while the parade is closed for COVID have included a job fair and a Health and Wellness Fair held on Labor Day.

Chanticleer

With the onset of the pandemic, all performances have been suspended. In the City of San Francisco, performance groups are not allowed to sing, which has eliminated both rehearsals and concerts. Annual revenue comes approximately half from performances and half from grants and donors, so the lack of performances in 2020 has had a major impact. All programming has moved online, which has generated some revenue through paid tickets, donor support has remained strong, and the federal government's Paycheck Protection Program has helped Chanticleer pay its members. Nevertheless, the group faces a significant deficit on a \$3 million budget. Planning for 2021 involves multiple budget scenarios.

Chinese Culture Center of San Francisco

The Center's revenue is derived from a range of sources, with approximately 30% from government, 20% from philanthropic contributions, 20% contributed income, and 10% earned income.

COVID's largest impact has been on earned income. The Center's auditorium, which is frequently rented to community organizations and is a significant source of income, has been closed since March 2020. Other programs have pivoted to a digital format. When many stores closed due to the city's shutdown, the Center partnered with the Chinatown Merchants Association to display artwork in closed storefronts.

The Contemporary Jewish Museum

After being closed due to COVID, the Museum's programs, including school tours, have moved online. It had been expected that 2020 would be a big year for exhibitions, which take several years to prepare, but which were canceled or curtailed. Revenue from space rentals to businesses and nonprofits—which draw heavily on activity at the Moscone Center and adjacent hotels and in 2019 accounted for \$750,000 out of a budget of just under \$8 million—was lost. Adjusting to the drop, staff size was reduced (particularly positions relating to on-site visitors) and staff time was cut for all employees. A wave of dedicated philanthropy helped the museum weather 2020, but great uncertainty remains around the number of visitors and the implications of limited visitation on the budget. Management is concerned that the number of days the museum can open will be curtailed, and that philanthropy won't be willing to support museums that are fully online.

Dancers' Group

In 2020, Bay Area Dance Week, the Rotunda Dance Series, and ONSITE programming were all canceled due to the pandemic.

Fine Arts Museums of San Francisco

Like all museums, COVID has impacted FAMSF; \$9 million, or 20% of the budget, was lost in fiscal year 2019–2020 when the museums were forced to close in March and revenue from ticket and retail sales dropped. Memberships dropped as well. In response, operating costs were cut by \$3 million, and the museums received a Paycheck Protection Program loan of \$3.5 million. For fiscal year 2020–2021, the museums' budget factors in a continued reduction in revenue due to their closure for the first three months, reduced programming and limited opening subsequently. As a result, the museums expect a \$20–22 million loss in revenue over the two fiscal years. To soften the impact, the museums have raised a donor-supported Recovery Fund of \$6 million, which has served to reduce layoffs. As of September 2020, 14 people were laid off and 35 furloughed by the Corporation of the Fine Arts Museum (COFAM), primarily in visitor-serving and retail roles.

Fort Mason Center for Arts & Culture

Given that Fort Mason Center for Arts and Culture (FMCAC) is a destination where people visit and interact, COVID-19 has had a major impact on campus operations. Prior to the pandemic, FMCAC hosted approximately 2,000 events annually, attracting 1.5 million visitors. Following local public health guidelines, since March 2020 there have been no indoor events, as the National Park Service has implemented a policy of following local health orders with regard to allowable activities on its properties. Revenue from large indoor events has historically been a major contributor to FMCAC's bottom line, enabling it to keep rents low for resident nonprofit organizations.

The financial implications to event revenue have been significant, with April to September results at 5% of what normal revenue would be during this time period. COVID-19 has had a similarly adverse impact on Fort Mason's resident organizations, and FMCAC is working with them to modify rents and support their survival.

It is important to note that under the terms of its lease with the National Park Service, FMCAC is required to rehabilitate the historic structures on the property, so its annual net income—which typically is around \$2 million—is reinvested in the maintenance and improvement of its facilities. Interim Executive Director Pat Nester notes that "we are stewards of the historic campus." The FMCAC portion of the recent renovation of Pier 2, for example, cost \$20 million and the anticipated rehabilitation of Pier 3 is expected to cost \$22–\$25 million; the anticipated cost of all projects over the next 30 years is expected to be over \$50 million. Even with facilities closed due to COVID, the obligation to maintain the campus continues, as do insurance and other built-in costs such as monthly payments to the National Park Service for emergency police/fire and other services. In response to the financial impact, FMCAC has been forced to implement a mix of staff furloughs, reduction in hours, and salary reductions. The Federal Paycheck Protection Program helped to sustain staff while funds were available, and portions of financial reserves have also been used to continue operations.

To the extent possible, FMCAC has pivoted activity by taking advantage of its large parking lot area to host outdoor events, including outdoor art markets, children's camps, and Fort Mason Flix, San Francisco's first drive-in theater. Fort Mason Flix, launched in September 2020, presents everything from family favorites to cult classics to blockbusters and art house cinema. In addition to showing films itself, FMCAC is partnering with city-wide arts and culture organizations to enable them to present their own programs. Community partnerships include San Francisco Jewish Film Festival, Intersection for the Arts, SF Film, Center for Asian American Media, and City Arts & Lectures, among others. The first month of films was a success, with every screening sold out and almost 6,000 tickets sold, bringing approximately 18,000 people to the Fort Mason campus. The new on-campus activity has in turn benefitted many of Fort Mason's other, currently open public-facing resident organizations.

Lamplighters Music Theatre

Lamplighters operates on a budget of approximately \$1.2 million, of which 45% is earned revenue and 55% is contributed. Due to COVID, 90% of its earned income has been lost and its budget for the 2020–21 fiscal year has been reduced to \$500,000. The company has sustained itself through donations, which are running ahead of last year, and federal Paycheck Protection Program loans.

With live performances cancelled, the company has moved to monthly streaming of archived performances. Its gala has moved online as well, and another digital event, an original musical variety show, debuted in February 2021. Student assemblies and workshops have been cancelled, though online programs are being considered after the successful online session with the San Francisco Conservatory of Music last summer. The budget for the company's current fiscal year, which runs from June through May, is based on staging a recital at the end of May but the prospects for that are uncertain, as are plans for its annual gala in the Herbst Theater in October. An outdoor event may be held in August, but Lamplighters doesn't expect to mount a full scale indoor production before February 2022.

Litquake

With the onset of COVID-19, all events were moved online. In the first three quarters of 2020 approximately 30 virtual events were held, with 1,500 attendees watching live and 8,000 watching videos after. In the spring of 2020, recognizing that there would be no ticket sales and that contributions might drop, the organization reduced its budget by 30%. Litquake has three full-time staff members (most workers at its events are volunteers) and no overhead beyond an office shared with a literary magazine, so overhead is low. While most venues are made available at no cost, larger ones are rented, so with no physical events in 2020 there have been additional cost savings. Tickets and educational programs typically provide a small share of the budget—about 10% each—with the balance coming from government grants, private grants, and a healthy donor base. To prepare for an uncertain 2021, the organization is turning to donors to help create a capital reserve.

Na Lei Hulu I Ka Wekiu

Na Lei Hulu I Ka Wekiu's budget of \$450,000–500,000 is extraordinary in the world of Hawaiian schools of dance. Where funding is scarce in Hawaii, community support in San Francisco is strong. Approximately 34% of revenue comes from ticket sales to the school's performances each fall, 23% from individual donors, 30% from grants including those from the City, and 13% from other sources. The Hewlett Foundation has been an important contributor for many years, helping to fund operations and the school's core staff of six. Classes and practice sessions normally take place in spaces rented by the San Francisco Unified School District.

With the loss of live performances, COVID has significantly reduced the halau's income. Tours, which normally bring in \$50,000, have been canceled. The major performance held each year at the Palace of Fine Arts, which normally generates \$50–70 thousand and this year would mark Na Lei Hulu I Ka Wekiu's 35th anniversary, will be held online.

Nihonmachi Street Fair

The 2020 Nihonmachi Street Fair was canceled due to COVID. Organizers considered a virtual program similar to the one-hour online event put on by the Cherry Blossom Festival when its events were canceled, but as a smaller organization, Nihonmachi Street Fair lacked the manpower and expertise. As an alternative and when conditions allow, it is considering the organization of smaller weekend outdoor concerts in Japantown's Peace Plaza that would provide opportunities for performers who no longer have venues.

Roxie Theater

Since closing in March 2020 due to the pandemic, all programming at the theater has been virtual.

San Francisco Autumn Moon Festival

With a \$130,000 budget, revenue to support the festival comes primarily from food and other commercial vendors (\$80,000), corporate sponsors (\$40,000), and the government (Grants for the Arts).

With the cancellation of the festival due to COVID, there was no vendor revenue, but also no associated expenses. The 2020 event was virtual—a one-hour program featuring recorded footage from 2019. Because sponsors prefer a physical event where they can meet customers to a virtual one, the festival lost sponsors. While having an online presence was important, the absence of a live event was felt. Eve Lee of the Chinatown Merchants Association observes "It's a difficult medium, and a challenge for the arts. In many ways, for an event like this, you have to be there. In Chinatown many people aren't online and some don't even have email."

San Francisco Ballet

COVID has heavily impacted the company. Holiday performances of the Nutcracker, which normally accounts for 35–40% of annual ticket sales, were canceled for 2020, and the 2021 season will be digital only. All seven programs of the main season, scheduled between January and June, will be streamed using previous performances, with additional virtual

performances being newly recorded. Subscriptions have fallen, though with the promise of a digital season, 72% of subscribers have renewed despite the absence of live performances. In a strategy to compensate, the company turned to crowdsourcing; approximately 60% of those who donated were new contributors including many from outside the San Francisco market area. Accelerating the strategy of extending ballet beyond the stage, the company has created SF Ballet@Home, which has enabled nearly half a million viewers to access streaming and recorded content online. Its Dance of Dreams program, recorded at the San Francisco Art Institute, the Palace of Fine Arts, and locations in the Golden Gate National Recreation Area, has received critical national acclaim.

San Francisco Conservatory of Music

The Conservatory's budget is built on \$23 million in tuition and fees (of which \$11 million is offset by scholarships), \$7 million in contributions, \$3.7 million in services and other educational revenue, and \$2.6 million drawn from its endowment. Approximately 1,000 individual donors and 56 institutional donors contribute to support scholarships, endowed chairs, and other programs.

While plans to grow haven't been realized, the school has been able to maintain its enrollment above 400 students. Because revenue from ticket sales is minimal, the absence of live performances hasn't significantly impacted revenue. With its stages closed during the COVID-19 shutdown, the Conservatory moved all its public performances online. Students in the Fall 2020 semester experienced a hybrid learning model using technology that allows for group rehearsals from separate spaces. The digital audio feed can then be mixed with software and streamed to audiences. The Conservatory's Fall 2020 schedule included streaming of 68 virtual concerts.

San Francisco Ethnic Dance Festival

The 2020 San Francisco Ethnic Dance Festival summer performances were canceled due to COVID. More than \$100,000 in anticipated revenue was lost, but expenses were also down. Educational programs pivoted as well. Online programs include Living

Traditions: Exploring Dance Beyond the Performance, featuring artist interviews and dance interactive activities with both local and international performers; Live Arts in Resistance, a cultural artist social justice interview series; and Digital Transformation 101, which shares best practices through online classes and events. Professional workshops offered online include Videography for Success in December 2020, which offered tips on creating compelling videos for fundraising and promotion, and the Archiving Dance Workshop: Digital Assets offered in March 2021 for dance makers needing to track photos and videos. World Arts West is also working on a comprehensive archive project to digitize, catalog, and share four decades of videos, photos, and other materials that likely constitute the largest world dance collection in the United States.

With COVID an ongoing concern, for 2021 the organization's management sees four possible scenarios: live events, outdoor performances (with appropriate precautions), a virtual season, or a combination. In the meantime, the organization has been using the lack of live performances as an opportunity to step back and reflect on its programs and how best to serve artists in its community in the future.

San Francisco Opera

With an annual budget of \$75 million, The San Francisco Opera saw its revenue drop \$10 million in FY 2019–2020 (July–June) due to COVID, and a drop of \$20 million is expected for FY 2020–2021, assuming that a summer 2021 season is possible. Union compensation has been reduced by up to 50% for those unable to work at the moment. While the full company was maintained through the summer of 2020 with the support of federal aid, without a new federal lifeline further adjustments to operations will be needed. Following negotiations with the union representing the Opera Orchestra, it was announced in September 2020 that while health coverage would continue, musicians' pay would be cut 50% for the fall season. With administrative staff reductions of 20% in the previous two years, operations were already lean. San Francisco's restrictions on indoor gatherings make planning for 2021 particularly difficult. This poses a distinct challenge

to the company's ability to attract and retain top talent, as live productions are already being staged in Europe, with which the Opera competes for singers and musicians. In addition to streaming past programs, a resumption of live performances has been announced for April and May 2021 using an outdoor drive-in format at the Marin Center in San Rafael.

San Francisco Pride

Pride marked its 50th anniversary in 2020, which made the weekend's cancellation due to COVID-19 particularly difficult. The organization's budget, which was originally set at \$3.85 million, was subsequently reduced to \$1.3 million. Half of the revenue supporting the event normally comes from corporate sponsorships, with the balance from donors, ticket sales, and other sources—including San Francisco's Grants for the Arts program. With revenues down but many event expenses already incurred, the organization is projecting a \$400,000 loss for the current fiscal year. A decision on whether to hold a 2021 event is still pending. To increase revenue, organizers are considering how to expand programming, including online activity, throughout the year.

San Francisco Symphony

All live symphony concerts have been canceled through June 30, 2021. From the first cancellation in March 2020 through the end of August, the Symphony lost more than \$14 million in ticket sales. Assuming the impossibility of another full season from September 2020 through August 2021, it expects to lose another \$26 million, leading to a cumulative loss March 2020–September 2021 of \$40 million. The Symphony's staff complement is normally about 500 including 150 administrative staff, 106 musicians, and several hundred part-time personnel such as ushers and stage hands. In response to the shortfall, 30 of 150 administrative positions were eliminated or furloughed and salaries were reduced for the remaining 120 staff through the end of the 2021 season. Unions agreed to short-term pay reductions from mid-April through the end of September 2020; longer term arrangements through August 2021 are being finalized under a "shared

sacrifice” plan. Some resources have been saved by lower marketing costs and not having to pay as many guest artists. But the largest costs aren’t variable costs but are fixed ones involving maintenance and people. Expenses for the current fiscal year should come to \$45 million, which is half what would be budgeted in a normal year but is still substantial.

Offsetting that, about \$45 million in revenue is expected from the Symphony’s endowment and from philanthropy. San Francisco Symphony CEO Mark Hanson sees the shutdown, despite its downsides, as a window for reflection and adjustment, and with the need to justify continued donor support an imperative for creativity, he says that “An overarching theme now is to look for these silver linings—to find ways to speed up changes in the organization that were already happening but can now be accelerated, particularly by giving voice to perspectives that aren’t part of the tradition of a symphony orchestra. By experimenting, we can register in the minds of many more people and redefine who we are as a symphony orchestra, which will make the recovery process more interesting and ultimately more successful.”

CURRENTS, a four-part video series and accompanying podcast series about the changing perspectives for symphony orchestras today, is seen as being one step in that direction. Another is SoundBox, an experimental performance space shared with the Opera. Launched in 2014, it seats 500 people for smaller ensembles and eclectic music in an intimate setting, similar to a nightclub, that appeals to different audiences. Since COVID, the facility has been reconfigured—along with the stage of Davies Symphony Hall—as a production studio for digitally broadcast performances that, like CURRENTS, will continue after COVID as a key component of the Symphony’s digital strategy. As part of SoundBox, in February 2021 the Symphony launched a new on-demand streaming service, SFSymphony+.

SFFILM

Approximately 60% of the San Francisco International Film Festival’s revenue is in the form of contributed income (members, board support, donors, philanthropy, and institutional sponsors), with 40% coming from ticket

sales. Due to COVID, the 2020 Festival was canceled and all SFFILM programming transitioned online, including Young Filmmakers Camp, FilmHouse Talks, film screenings, and Q&A with filmmakers. While this was a successful transition, SFFILM Managing Director Elizabeth O’Malley notes that online programming isn’t a revenue driver (“you can’t make money”). In these circumstances contributed income becomes particularly important, but in 2020 that fell sharply as events dropped off and donors shifted priorities. As a result, the organization’s budget is projected to drop from an originally estimated \$7.5 million to \$5.4 million. Cushioning the blow to a degree, expenses such as venue rental are also down. The City of San Francisco’s Grants for the Arts program is one of very few grant programs in the Bay Area that provides unrestricted general operating support, making it particularly important to SFFILM’s ability to sustain its core operations and staff.

SFJAZZ

Since the COVID shutdown, SFJAZZ earned revenue from tickets has dropped by \$11 million, or 50–60%. Deposits for canceled shows were paid to artists, and ticket holders were given the option of refunds, making a donation, or credit on a future purchase. Two staff members were laid off, 18 had their hours reduced, 10 were furloughed (primarily from front of house), and tiered cuts were adopted for staff with salaries above \$80,000—an approach that, while painful, helped to save jobs. Even with programming going digital there is still a need for box office management and work in digital production.

Current estimated revenue of \$1 million from online programs covers less than 10% of the shortfall. The pandemic accelerated an embrace of digital that was already planned, and management believes that once historic revenue levels are restored, digital income will remain a permanent feature. Other innovations include a digital “tip jar” that is split with the artists whose presentations are being replayed, and digital memberships at \$5 per month that provide access to digital programming. Fridays at Five provides pre-recorded digital performances of major artists every Friday afternoon. The accompanying chat function

allows fans and artists to engage with each other during the performance. Auditions for the SFJAZZ High School All-Stars were conducted remotely in 2020.

SFJAZZ CEO Greg Stern notes that in these circumstances where earned income is severely restricted, contributed income becomes even more important. In the meantime, the SFJAZZ Center is taking opportunity of the pause in activity to evaluate and reassess its programs and operations. Reflecting on the impact of the shutdown on artists Stern says the effect has been “nothing short of devastating, but with some hope. These are people who devoted their lives to the art and may be on the road 250 days a year; then suddenly their source of income has been abruptly halted.”

SFMOMA

Like other museums, SFMOMA's operations have been impacted by COVID. Revenue comes from a mix of earnings from ticket sales, retail operations and the rental of its facilities for events, donor contributions, and from the museum's endowment. While space is made available to nonprofits at cost, revenue from corporate events (often associated with activity at Moscone Center) has also dropped precipitously. There were 90 facility rentals in 2019 but only 23 in 2020, all before the shutdown, causing net revenue from those events to fall from \$1,385,000 to \$157,000. Approximately 50% of the museum's revenue comes from paid visitors; the museum is projecting a 50% fall in ticket sales from non-local visitors in the 2020–2021 fiscal year, a \$16 million drop. In August 2020, it was announced that furloughs would take place one day each week for all full-time and some part-time employees, amounting to a 20% loss in pay. The furloughs ended, however, when the museum re-opened to visitors at 25% of normal capacity in October. During the COVID shut-down, educational programs such as “Sunday Family Days” have moved online and toward activities that could be done at home (for example through over 4,500 art kits distributed through the San Francisco Unified School District for students in grades 3–5).

SF Performances

SF Performances' last concert of 2020 was on February 29. Revenues normally come 40% from earned income and 60% from contributions. While ticket sales in the 2019–2020 fiscal year were down 40%, or \$400,000, contributions have held up. The budget for the 2020–2021 fiscal year has been cut by \$1 million from its pre-pandemic level. Expenditures have been reduced, primarily for artistic and programming expenses but also for administrative costs across the board. There have been no layoffs or furloughs from the organization's eight full-time and four part-time staff so far, but if live performances are unable to resume in early 2021, difficult choices will be required, including both staff and salary reductions. SF Performances has benefitted from having low overhead, with no building to maintain or company of artists to support (in contrast to the Opera, Symphony or Ballet); typically no more than five guest artists are on stages at any time.

To compensate for the lack of live performances, SF Performances has drawn on its archives since April 2020 to present *Front Row*, a digital concert series. While not live-streaming concerts, SF Performances presented newly recorded material starting in June through *Sanctuary*, a program recorded in a church in Marin County, and a first-ever podcast series focused on musical history was launched in the fall.

In October, a proposal was presented to San Francisco's Department of Public Health to allow for small audiences of 100–200 people in Herbst Theater, similar to the provision made for churches (the theater's capacity is 900). A mini-festival is being considered for the summer of 2021.

Stern Grove Festival

COVID has had a large impact on the Stern Grove Festival, with 2020 being the first year since the Grove's founding (after more than 800 shows), that attendees couldn't gather in person, with performances by artists such as Billy Ray Cyrus (country), Jimmy Cliff (reggae) and Tower of Power (R&B) cancelled. Much of the money raised by Stern Grove Festival is received through the concerts, so in 2020 many donations from individuals—usually given on the day of the event—didn't come in, resulting in an estimated 60% drop in revenue for 2020. The situation has been navigable in part because COVID hit just before the Festival would have started its mass hiring, and significant savings were realized because large artists fees were not incurred. So while its budget is not at break even, the ability to curtail expenditures has helped the organization sustain its operations. While some seasonal staff who had already been hired were furloughed, most of the permanent staff remains in place.

As an alternative to live performances, Stern Grove Festival has moved to digital programming, using footage of shows captured over the last 12–15 years. In 2020, 10 digital episodes were produced using archival footage and newly-recorded material. A partnership with KPIX (CBS) to air the episodes on TV produced an average of 56,000 viewers per show (or 560,000 viewers over the season). Other online viewing, estimated at 20,000, brought the total number of viewers for the season to 580,000.

For 2021, planning has focused on three contingencies: a normal season, another virtual season if people aren't allowed to gather, and a middle option with reduced capacity and socially distanced shows with perhaps 1,500–2,000 people in attendance, potentially supplemented by streaming the performances. While this seems like the most likely option at the moment, it will present challenges due to the non-ticketed nature of the performances and the openness of the site.

Theatre Bay Area

Asked about the world currently faced by theater artists Theatre Bay Area Executive Director Brad Erickson said, "It's devastating. Most are completely without work from theater. Some get digital work, but it doesn't pay at the same level, and there's not very much of that." Many theater artists get by on other day jobs. Mid-sized theater companies are under particular pressure. Many have theater facilities to maintain (a major expense) but are operating with fewer staff. While small companies also face major challenges, they are often project-based and may not have offices, so with less overhead are better able to scale down. One concern, however, is that if many small and medium-sized companies fail to emerge from the shutdown, there will be fewer opportunities in the future for artists to cut their teeth on stage and grow their professional careers.

While the city's arts and cultural organizations have been severely impacted by the COVID-related shutdowns, they can also play an important role in its post-pandemic recovery. With life disrupted since the spring of 2020 and cultural deprivation and social isolation the norm, many residents are craving cultural enrichment and renewed social connection. An inherently social process and universal medium, art serves as a vehicle for social engagement as well as personal healing. As the first live performances to return are likely to be outdoors, arts will also provide an opportunity to reanimate public spaces and restore the urban fabric.

“Arts are a key part of the brand and identity of San Francisco. The city has world class arts organizations that tell the stories of our communities and are part of its heart and soul. This makes San Francisco a great place to visit, live and work.”

— Jennifer Bielstein,
Executive Director, A.C.T.

“Because of its high cost of living and of housing in particular, musicians—who are in the gig economy—are leaving. Some have given up performing and returned to live with their families and others have moved to less expensive places. Elizabeth Blumenstock, for example, one of the nation’s leading baroque violinists who performs with ABS, relocated to New Mexico. She will still perform here but will have to travel. Because it’s so difficult to re-enter the housing market once you leave, some may never return.”

— Don Scott Carpenter, Executive Director,
American Bach Soloists

“We frame this conversation in terms of economic recovery. But actually the biggest question is about social recovery. The arts in general have a critical place in terms of recovering from the pandemic, and the really interesting challenge for the arts—when we are seeing some of the worst of ourselves—is that the arts represents the best of ourselves. The job of the arts is to be part of that human recovery.”

— Henry Timms, President,
Lincoln Center for the Performing Arts
as quoted by The Washington Post



The San Francisco Arts Ecosystem

San Francisco's arts community is an ecosystem in which large organizations and small ones are connected and interdependent. An artist who works at a large theater and is well-compensated, for example, has the means to also work at smaller companies that offer less compensation, and having a broad base of smaller and community theaters provides a platform where artists can develop their crafts and build their careers. Musicians may play with multiple orchestras or bands. From this perspective, the loss of smaller organizations and venues brings systemic risk, potentially diminishing the whole.

With its diverse communities, San Francisco also benefits from the ability of its arts sector to support social mobility. Arts have proven to be an avenue for talented people from distinct cultures and from disadvantaged communities to be recognized and to build careers in fields ranging from the performing arts to design, fashion, and other creative industries. Many of the city's arts organizations draw on its pool of multicultural talent and have incorporated a social equity dimension into their programming.

"All artistic activities are subsidized, and without philanthropy, we could never have these opportunities. Other regions can't provide the breadth of artistic opportunities as they lack the culture of philanthropy. It's embedded here.

San Francisco is rare for having major institutions across every arts field, with strength in multiple artistic areas—something rare outside New York. And because San Francisco is such a large arts ecosystem, people can move between organizations and different art forms quite easily. This produces a more sophisticated employee and professional base. Arts organizations are always trading employees."

**— Jason Seifer, CFO,
Fine Arts Museums of San Francisco**

"Strong grassroots arts organizations are often the way people without power can convert their talent to success and social mobility."

— Tim Brown, Chairman, IDEO





6

Conclusion

This report concludes with several findings and observations that go beyond the high-level numbers:

- Few other cities in the nation enjoy a similar depth or breadth of arts-related activity.
- Arts organizations make an important contribution to the economy of the City through spending and employment, by attracting tourism, and by supporting restaurants and other small businesses in the communities where they are located.
- Arts organizations support extensive educational programs that extend deep into the community and in particular benefit public schools. Few other cities in the country can draw on a similar depth or diversity of resources that support arts and music education.
- Arts organizations across the board have been severely impacted by the closure of facilities due to the COVID-19 pandemic. Organizations with buildings or facilities to maintain, which constitute fixed overhead, are often the most impacted. Lacking work and employment venues, individual artists have been particularly affected.
- Nearly all arts organizations have pivoted to online programming. This has enabled some to reach new or larger audiences but does not begin to compensate for the loss of revenue from ticketed admissions.
- Many arts organizations are using the pause in activity due to COVID as an occasion to re-evaluate their programs and how they serve their constituencies. There is great uncertainty surrounding plans for 2021 and when venues can reopen. This particularly affects the performing arts.
- As a general rule, arts organizations draw on both earned income (for example from ticket sales) and contributed income (from grants or donations). At a time when earned income is limited or non-existent, contributed income assumes added importance. In this context, support from Grants for the Arts and the San Francisco Arts Commission is particularly welcome, as the unrestricted income they provide helps support core staff and operations.
- The city's arts community comprises a complex ecosystem of large and small organizations that are mutually dependent on each other as artists move between them. The health of the system therefore depends not only on the health of large, iconic institutions, but on the network of smaller organizations, as well.
- The city's vibrant and diversified arts community helps attract technology companies, creative industries and a talented workforce. A diminution of the sector would undermine a key competitive advantage.

“I think of...all the arts...as a sort of extension of human life. The very same things that we value most, the ideals of humanity, are the properties of the arts.”

— David Park, Bay Area painter, 1911–1960

Notes

1. Ten categories include: Artistic Legacy Fund (ALG), Arts Impact Endowment Grants (AIE), Creative Community Response (CCR), Creative Space Planning & Facility improvement (CRSP), Cultural Equity Initiatives (CEI), Ebony McKinney Arts Leadership Grant, San Francisco Artist Grant (SFA), SOMA Nonprofit Facilities Fund (SPX), the Sankofa Initiative (SPX), and Special Project Grants (SPX).
2. Fiscal years 2017–2021
3. This includes full-time and part-time employees.
4. Americans for the Arts, Arts & Economic Prosperity 5—San Francisco report, 2015
5. Calculated from rental rates data provided from the War Memorial for FY18 and FY19
6. Different from GFTA supported organization independent contractors, insight into how the “as-needed” employees are utilized throughout the year for different events hosted at the War Memorial is available, whereas insight into independent contractors is unavailable for other organizations. Each “as-needed” employee is counted as part-time, resulting in an estimated 50% of their respective impact.
7. These are considered part-time employees.
8. City and County of San Francisco’s Budget (FY 2019) from the San Francisco Controller’s Office, accessed via www.openbook.sfgov.org
9. SPUR Ballot Analysis: San Francisco City Measures, November 2018
10. San Francisco Travel Association and Destination Analysts, 2019 San Francisco Visitor Profile Report of Findings, February 2020
11. Ibid.
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