



# APPENDIX

## to Belonging In Oakland: A Cultural Development Plan

*Spring 2018*

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CITY OF  
**OAKLAND**

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## SUMMARY

The City of Oakland's last economic impact report in the arts was provided by the national non-profit Americans for the Arts (AFTA) in 2010. At that time, AFTA polled 271 Oakland-based non-profits identified by the City. It received responses from 53, a capture rate of about 20%. But had all of the 271 non-profits responded, the picture of the city's Arts and Cultural Economy (ACE) still would've been quite incomplete. The reason is that Oakland's ACE is made up of a wide range of individuals and groups. It certainly includes arts and cultural non-profits, large and small. But it also includes an array of small businesses, growing companies, informal collectives, and organizations that use the arts to pursue social justice.

This report tries to remedy the conventional limits of the previous one by creating an expanded conception of the ACE universe; using multiple data sources to examine the economic impact of different parts of that universe; and, at the end, suggesting future avenues and methods of research to improve the picture even further. Here are some of the highlights:

- As of 2017, Oakland was home to **217 ACE non-profits**. Together, they poured over **\$83 million** into the local economy and hired **1,489 employees** on a full-time or part-time basis. In addition, among the 82 organizations for which more detailed data are available, they hired or engaged around **2,500 contractors and interns** and **2,200 volunteers** through their work. Those 82 organizations also served over **800,000 audience members**. While admirable, this was significantly less than similar organizations in Berkeley, implying that Oakland's non-profits have an opportunity to expand their share of regional arts audiences.
- The expenditures of these organizations and their audiences created an estimated additional **3,672 full-time equivalent (FTE) employees** and **\$80 million in household income** in non-arts sectors as a result of indirect economic impacts. They also generated an estimated **\$4.1 and \$6 million in City and State taxes**, respectively.
- Beyond the non-profit sector, the city was home to **1,055 ACE businesses** across a range of artistic disciplines, amounting to **4.8% of all firms citywide**. These businesses produced **\$390 million in gross sales** and hired **4,065 employees** on a full-time or part-time basis, making them an even greater employer of arts-related workers than local non-profits.
- Between the for-profit and the non-profit sectors combined, the city's ACE directly employed over **5,554 full-time or part-time workers**.
- The city was also home to over **35 additional community-serving organizations** that either operate as informal collectives or non-conventional businesses. Many of them have a significant impact on Oakland's identity as a place that supports a unique and vital union of cultural creativity and social justice, making this a key area of future research.

# THE ARTS AND CULTURAL ECONOMY (ACE)

Oakland's Arts and Cultural Economy (ACE) is extensive, eclectic, and evolving. It's woven into every neighborhood and commercial corridor, leaving no part of the city or its communities untouched. It deliberates in the boardrooms of high rises. It toils in dimly lit studios and warehouses. It pops up in shoe stores and storefronts. It takes to the streets. It tags, tattoos, and transforms the skin of local residents and liquor stores alike. It sweats its prayers amidst the flashing lights and fancy cocktails of bars and nightclubs. It's commercial and communal, traditional and cutting-edge, refined and radical. It's none-of-the above. It's non-binary.

It puts Oaklanders to work. It beckons them to open their minds and their hearts. Often their wallets, too. It teaches their children. It designs, decorates, and operates the spaces of the city. Then it fills them with sights, sounds, smells, and experiences. It's the Bottoms and the Uptown, the most historic Town Biz, the newest New Oakland. At best, it's a bridge. Bringing the margins to the center. Creating means for social, cultural, and economic self-determination in the city's most disinvested neighborhoods.

The Oakland Cultural Plan thus calls for a portrait of local economic activity as varied as the ACE itself. For the purposes of data collection and analysis, we've broken the universe of the ACE down into four categories:

1. **Businesses:** For-profit firms that conduct arts and cultural activities.
2. **DataArts Non-Profits:** Non-profit organizations that produce and present arts and cultural work, for which DataArts Cultural Data Profiles are available.
3. **Other Non-Profits:** Non-profits for which DataArts Cultural Data Profiles aren't available.
4. **Informal Groups:** Small businesses and informal collectives that produce and present community-serving arts and cultural work, like those in Categories 2 and 3, but that aren't incorporated as non-profits.

These categories share many things in common with one another. Categories 2 and 3, for example, both consist of non-profit organizations, while there are businesses in both Categories 1 and 4. But we've chosen to sub-divide the ACE into these four groups in order to reflect differences in data collection. There's no single data source with information on all segments of the ACE. DataArts, for instance, has detailed data on 82 ACE non-profits in Oakland. But to stop there would be to miss the other 135 otherwise similar and no less important organizations identified through this Plan. So we've had to gather and analyze data from a range of different sources—each of which comes with its own strengths and weaknesses, allowing certain forms of analysis, but precluding others. This approach allows for an overall analysis that is at once

*relatively comprehensive and internally incommensurable.* In other words, since there are variations in the data across each segment of the ACE, the economic impact of each segment is measured differently, as well. And this means that we cannot simply add or compare the data across categories. Rather, each category must be viewed through a distinct lens as a unique, but nonetheless important, part of the whole. This report now discusses each of these categories in turn, using numerical data for Categories 1-3 and anecdotal data for Category 4.

But first, it should be noted that the ACE also consists of a significant number of self-employed artists. These individuals are in part captured by Categories 1-4; some are incorporated as businesses (Category 1), while others may be employed temporarily or part-time by non-profits that hire artists to work on a particular program, performance, or campaign (Categories 2-3). Still, there's no reliable and readily available data source on the economic activities and social traits of individual artists at the city level. We discuss some potential avenues to and caveats about data collection on this segment of the ACE at the end of this report.

## Category 1: Businesses

This category consists of for-profit firms that conduct arts and cultural activities in Oakland. This includes businesses involved in the production, sale, and presentation of creative work across the full spectrum of artistic media or disciplines, including:

- Visual arts
- Performing arts
- Literary arts
- Music and entertainment
- Film and broadcasting
- Cultural institutions
- Design

Each of these disciplines is composed of several sub-categories as defined by the North American Industry Classification System (NAICS). NAICS is a tool for grouping businesses, workers, and activities according to the types of economic practices in which they're involved (e.g. designing websites versus selling cars versus tending to the sick). It's used by most U.S. government agencies. All across the country, cities and scholars have used NAICS codes to devise various definitions of the Arts and Cultural Economy. For the Cultural Plan, we compared the definitions used by three well-regarded studies and asked: Do these definitions reflect arts and cultural activities in Oakland? We then came up with our own grouping of NAICS codes that

balance standard definitions of the ACE with those activities that are particular to Oakland. In the process, we consulted:

- Ann Markusen et al. 2008. Defining the creative economy: Industry and occupational approaches. *Economic Development Quarterly*, 22(1), pp. 24-45.
- City of San Antonio. 2011. San Antonio Creative Industry Report: Economic Impact and Significance.
- Americans for the Arts. 2016. National Arts Index 2016: An Annual Measure of the Vitality of Arts and Culture in the United States: 2002-2013.

The following table shows the activities included in our definition of the universe of ACE businesses. On the left are the NAICS codes included in this report, grouped by artistic discipline. Next, for the purposes of comparison, the three columns on the right show which of these codes are included in the definitions used by the studies consulted.

**Table 1: Definition of Disciplines, ACE Businesses by NAICS Codes**

Oakland Cultural Plan	Markusen et al.	San Antonio	AFTA
<b>Visual Arts</b>			
323111 Commercial printing (except screen and book)	X	X	
323113 Commercial screen printing	X	X	
323120 Support activities for printing	X	X	
339911 Jewelry and silverware manufacturing	X		X
339940 Office supplies (except paper) manufacturing	X		X
423410 Photographic equipment and supplies merchant wholesalers	X		X
423940 Jewelry, watch, precious stone, and precious metal merchant wholesalers	X		
443130 Camera and photographic supplies stores	X	X	X
451130 Sewing, needlework, and piece goods stores	X		
448310 Jewelry stores	X		
453920 Art dealers	X	X	X
541921 Photography studios, portrait	X	X	X
541922 Commercial photography	X	X	X
711510 Independent artists, writers, and performers*	X	X	X
812921 Photofinishing laboratories (except one-hour)	X	X	
<b>Performing Arts</b>			
611610 Fine arts schools	X	X	X
711110 Theater companies and dinner theaters	X	X	X
711120 Dance companies	X	X	X
711190 Other performing arts companies	X	X	X
711510 Independent artists, writers, and performers*	X	X	X



<b>Literary Arts</b>			
323117 Book printing	X	X	
424920 Book, periodical, and newspaper merchant wholesalers	X		
451211 Book stores	X		X
511110 Newspaper publishers	X	X	
511120 Periodical publishers	X	X	
511130 Book publishers	X	X	X
511199 All other publishers	X	X	
711510 Independent artists, writers, and performers*	X	X	X
<b>Music &amp; Entertainment</b>			
334612 Software and other prerecorded compact disc, tape, and record reproducing	X		X
339992 Musical instrument manufacturing	X		X
451220 Prerecorded tape, compact disc, and record stores	X		X
451140 Musical instrument and supplies stores	X	X	X
512230 Music publishers	X	X	X
512240 Sound recording studios	X	X	X
512250 Record production and distribution	X	X	X
512290 Other sound recording industries	X	X	X
711130 Musical groups and artists	X	X	X
711131 Promoters of performing arts, sports, and similar events with facilities		X	
711132 Promoters of performing arts, sports, and similar events without facilities		X	
711410 Agents/managers for artists, athletes, entertainers, and other public figures			
711510 Independent artists, writers, and performers*	X	X	X
722410 Drinking places			
<b>Film &amp; Broadcasting</b>			
512110 Motion picture and video production	X	X	X
512120 Motion picture and video distribution	X	X	X
512131 Motion picture theaters (except drive-ins)	X	X	X
512132 Drive-in motion picture theaters	X	X	X
512191 Teleproduction and other postproduction services	X	X	X
512199 Other motion picture and video industries	X	X	X
515111 Radio networks	X	X	X
515112 Radio stations	X	X	X
515120 Television broadcasting	X	X	X
515210 Cable and other subscription programming	X	X	
519130 Internet publishing and broadcasting	X	X	
532230 Video tape and disc rental	X		X

\*Disaggregated by discipline

Oakland Cultural Plan	Markusen et al.	San Antonio	AFTA
<b>Cultural Institutions</b>			
519120 Libraries and archives	X	X	X
712110 Museums	X	X	X
712120 Historical sites	X	X	X
712130 Zoos and botanical gardens	X	X	X
<b>Design</b>			
541310 Architectural services	X	X	X
541320 Landscape architectural services	X	X	
541410 Interior design services	X	X	X
541420 Industrial design services	X	X	
541430 Graphic design services	X	X	X
541490 Other specialized design services (fashion)	X	X	X
541810 Advertising agencies	X	X	X

Source: Oakland Cultural Plan

With these definitions, we collected data on the relevant businesses in Oakland using EconoVue, a service that maps businesses according to location and NAICS code. EconoVue is built on data from Dun & Bradstreet (D&B), a company that tracks the economic performance of private-sector firms. In particular, we used these data to focus on gross sales and employment. The data, which are annualized, are approximate to the year 2017. Before we proceed to the findings, three caveats are in order.

First, D&B estimates that the businesses in its database account for 99% of U.S. GDP, making it one of the most comprehensive sources of information on private-sector activity. But a review of their listings of the firms that make up Oakland's ACE reveals that some relevant local businesses are missing from their database.<sup>1</sup> This means that the figures below represent an *underestimation* of the total volume of private-sector activity in the city's ACE. In addition, we removed two businesses—Pandora and the Tribune<sup>2</sup>—from the dataset. In general, broadcasting and newspaper publishing are part of the ACE. But the volumes of sales and employees for these two companies were so much greater than most of the other ones that we decided to set them aside so as to not distort the picture of the remaining firms. In particular, Pandora was listed with over \$1.3 billion in gross sales and 2,200 employees worldwide, while the Tribune was listed with over \$23 million in sales and 800 employees. Third,

1 According to an email communication with D&B, the company requires at least three different cross-referenced information sources to include a business in their database. The first is usually a business registration document, while the corroborating ones typically include records of credit transactions conducted in the business's name. Since many small businesses, however, conduct their transactions in cash or with a credit card in the owner's name, such businesses are prone to fall through the cracks.

2 The company is listed as the Oakland Tribune, even though it has since become folded into the East Bay Times.

the D&B data didn't capture some cutting edge art and music tech firms like VSCO, Bandcamp, and Rockbot. This is likely because their hybrid position in between traditional industries makes them more difficult to recognize as ACE versus tech businesses. But it means that, again, the figures below represent a conservative estimate of the scale of Oakland's ACE businesses. Still, it's important to recognize the influence of these companies on Oakland's ACE growth.

**Table 2: Number of Firms by Discipline, ACE Businesses (2017)**

<b>Discipline</b>	<b>Firms</b>	<b>% Total</b>
Visual Arts	277	26.3%
Performing Arts	41	3.9%
Literary Arts	90	8.5%
Music & Entertainment	195	18.5%
Film & Broadcasting	150	14.2%
Cultural Institutions	14	1.3%
Design	288	27.3%
<b>ACE Businesses</b>	<b>1,055</b>	<b>100.0%</b>
<b>All Businesses</b>	<b>22,122</b>	<b>N/A</b>

Source: EconoVue/Dun & Bradstreet

In total, Oakland was home to 1,055 ACE businesses in 2017, amounting to 4.8% of all of the firms in the city. The largest disciplines by the number of individual firms were Design (288, 27.3% of total) and Visual Arts (277, 26.3%). The total number of firms in the city (22,122) is based on the total number of Oakland-based firms listed in the D&B database.

**Table 3: Number of Employees<sup>3</sup> by Discipline, ACE Businesses (2017)**

<b>Discipline</b>	<b>Employees</b>			
	<b>Employees</b>	<b>% Total</b>	<b>Average</b>	<b>Median</b>
Visual Arts	567	13.9%	2.05	1.00
Performing Arts	93	2.3%	2.27	1.00
Literary Arts	603	14.8%	6.70	2.00
Music & Entertainment	562	13.8%	2.88	2.00
Film & Broadcasting	770	18.9%	5.13	2.00
Cultural Institutions	108	2.7%	7.71	2.00
Design	1,362	33.5%	4.73	2.00
<b>ACE Businesses</b>	<b>4,065</b>	<b>100.0%</b>	<b>3.85</b>	<b>N/A</b>
<b>All Businesses</b>	<b>200,798</b>	<b>N/A</b>	<b>9.08</b>	<b>N/A</b>

Source: EconoVue/Dun & Bradstreet

<sup>3</sup> According to an email communication with D&B, these figures represent a sum of full-time and part-time employees. The two can't be disaggregated.



In total, these firms employed 4,065 people on a full-time or part-time basis, amounting to 2.0% of all of the private-sector jobs in the city. In other words, ACE businesses represent a greater share of firms (4.8%) than jobs (2.0%) citywide. This is reflected in the fact that ACE businesses tend to be much smaller (3.86 employees/firm, on average) than private-sector businesses in general (9.08 employees/firm). This is likely because ACE workers and activities tend to be less valued in commercial markets than other elements of the private sector. However, there's significant variation across disciplines. First, the market valuation of ACE activities tends to be lower the closer one gets to the process of artistic production (e.g., illustrators, writers, and choreographers) than artistic distribution and sales (e.g., publishers and broadcasters). Second, the valuation of certain practices, such as live music and dance, is limited by the fact that the marketable product is limited to one-of-a-kind works that are rooted in the embodiment of individual artists. Other practices, however, such as commercial film and photography, are based in mechanical and even electronic reproduction, and thus aren't limited in the same way. And third, certain activities, such as visual art, tend to be individualized, while others, such as architectural design and publishing, tend to involve teamwork among employees with a range of different specialties. So, it's unsurprising that, among the different disciplines, the largest ones by number of employees are Design (1,362, 33.5% of total) and Literary Arts (603, 14.8% of total), which includes newspaper, magazine, and book publishers. Similarly, the largest firms, by average number of employees, are found in Literary Arts (6.70 employees/firm), Film and Broadcasting (5.13 employees/firm), and Design (4.73 employees/firm). (Note: The discipline of Cultural Institutions has been largely excluded from this discussion because its figures are distorted by the small number of firms and, as a result, the outsized impact of the Oakland Zoo.) The total number of employees in the city (200,798) is based on the aggregate employees for all of the Oakland-based firms listed in the D&B database.

**Table 4: Gross Sales by Discipline, ACE Businesses (2017)**

Discipline	Sales			
	Gross Sales	% Total	Average	Median
Visual Arts	\$49,872,592	12.8%	\$180,045	\$62,096
Performing Arts	\$3,234,701	0.8%	\$78,895	\$50,000
Literary Arts	\$64,292,950	16.5%	\$714,366	\$106,879
Music & Entertainment	\$24,679,753	6.3%	\$126,563	\$77,859
Film & Broadcasting	\$55,872,851	14.3%	\$372,486	\$82,567
Cultural Institutions	\$22,787,692	5.8%	\$1,627,692	\$86,427
Design	\$169,841,237	43.5%	\$589,727	\$111,842
<b>ACE Businesses</b>	<b>\$390,581,776</b>	<b>100.0%</b>	<b>\$370,220</b>	<b>N/A</b>

Source: EconoVue/Dun & Bradstreet

The annual volume of gross sales for Oakland’s ACE businesses amounted to over \$390 million. Once again, the greatest volume of sales was in Design (around \$170 million, 43.5% of total) and Literary Arts (\$64 million, 16.5% of total) while the smallest was in Performing Arts (\$3 million, 0.8% of total). Therefore, while there was an evident disparity between the largest and smallest disciplines across all of these metrics, the greatest disparity occurred in the realm of sales (versus either the number of firms or employees). Indeed, the median sales of businesses in Design (around \$112,000) and Literary Arts (\$107,000) far surpassed those in Visual Arts (\$62,000) and Performing Arts (\$50,000).<sup>4</sup>

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**Table 5: Productivity by Discipline, ACE Businesses (2017)**

<b>Discipline</b>	<b>Sales/Employee</b>
Visual Arts	\$87,959
Performing Arts	\$34,782
Literary Arts	\$106,622
Music & Entertainment	\$43,914
Film & Broadcasting	\$72,562
Cultural Institutions	\$210,997
Design	\$124,700
<b>ACE Businesses</b>	<b>\$96,084</b>

*Source: EconoVue/Dun & Bradstreet*

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On average, Oakland’s ACE businesses generated \$96,000 worth of sales per employee. As expected, the highest rates of productivity were found in Design (around \$125,000 sales/employee) and Literary Arts (\$107,000 sales/employee) while the lowest were found in Music and Entertainment (\$44,000 sales/employee) and Performing Arts (\$35,000 sales/employee). (Again, Cultural Institutions have been excluded from this discussion for the reasons given above.) Interestingly, while Music and Entertainment performed well in terms of overall employment (13.8% of total), it performed far worse in terms of gross sales (6.3% of total), making it one of the “least productive” disciplines on a sales/employee basis. This implies that, while a good number of Oaklanders work in music and nightlife, their sales—and also likely their earnings—are lower than average.

In sum, while a substantial number of businesses in Oakland are engaged in the ACE, they tend to be much smaller than average in terms of the number of people they employ. But there are significant disparities across different disciplines. On the whole, Design—which encompasses architecture, landscape, interior, industrial, graphic, and fashion design—performs the best across most measures. This is likely

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<sup>4</sup> Unlike firms and employees, the aggregate gross sales for all of the private-sector businesses in Oakland is not available through D&B because, for firms with multiple locations, D&B assigns all of the sales from their various branches to the headquarters, rather than breaking it down by city.

due to the fact that such activities are professional services tied to more capitalized sectors of the local and non-local economies, such as construction, real-estate development, and advertising. The same is true, albeit to a lesser degree, for Literary Arts. While this category includes authors and neighborhood-serving bookstores, neither of which are known to make a lot of money, it also includes mid-to-large-scale publishers—such as Sunset Magazine, East Bay Express, and University of California Press—which serve the region and beyond.

On the other hand, disciplines such as Visual Arts, Performing Arts, and Music and Entertainment, which are more tied to local expression than large-scale commercial markets, tend to generate more jobs than they do sales. This implies that compensation and profit tend to be lower in these fields than more commercialized ones. While demographic data on employees in each of these disciplines aren't available, it's quite likely that activities like design, publishing, and broadcasting, which tend to take place within larger companies, require more formal or graduate-level training. This makes the higher value jobs within the ACE less accessible to people and communities that suffer economic and educational inequalities than lower value ones, such as being a musician, dancer, photographer, or nightclub promoter.

At the same time, the racial/ethnic disparities in the ACE may be less extreme than in other sectors of the Oakland economy, making it all the more worthwhile to take an equity-based investment strategy in this sector as a way to promote more social equity citywide. The U.S. Census Bureau has released data (current to 2012) on the number and revenues of firms by the race/ethnicity of their owners. The data are aggregated at the 2-digit NAICS level. This means that, while they can't be used to analyze patterns at the level of the artistic discipline, they can be used to compare the Arts, Entertainment, and Recreation sector to other broad sectors of the Oakland economy. These data show that, while only 40% of local firms were owned by non-Latino Whites, they earned more than 66% of total revenue. In other words, even though they were in the minority by number, White-owned firms captured a majority of the business in the city. This disparity played out across almost every sector of the economy. (It was most extreme in the construction sector, where non-Latino Whites owned around 30% of the firms but earned 95% of the revenue.) Interestingly, however, Arts, Entertainment, and Recreation was only one of two sectors in which the pattern was reversed. Here, the share of firms and revenues for non-Latino Whites was proportionally stable across the two measures (at 56%). Black-owned firms, on the other hand, made up only 20% of the businesses but 29% of the revenues—making Arts, Entertainment, and Recreation the only sector in which the revenues of Black-owned businesses were proportionally greater than the number of firms.<sup>5</sup> *This implies that, given the current structure of the city's economy, this sector is unique in its ability to distribute economic benefits to entrepreneurs of color that are on par with, or even superior to, those captured by non-Latino Whites.*

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5 All figures are based on the 2012 U.S. Census Survey of Business Owners.

## Category 2: DataArts Non-Profits

The next two categories, which consist of non-profit organizations, contain many of the longstanding and community-serving outfits most often identified with Oakland's cultural landscape. By and large, these organizations aren't funded by sales, as with the businesses in Category 1, but rather by grants and donations provided by public, private, and philanthropic agencies. Despite these differences, however, non-profits still have a major economic impact as they buy, rent, and renovate space; employ artists, designers, curators, and administrators; consume local goods and services; and so on. But compared to the private sector, data on the economic activities of local non-profits are collected far less systematically. Hence, as discussed above, we've chosen to combine data on non-profits from multiple sources. The first is DataArts.

DataArts is a national organization that collects in-depth information on arts and cultural non-profits through an online survey. The intention is to create a standardized means of reporting for organizations that apply for grants from foundations and public agencies. Indeed, many grantmakers now require that applicants create what's called a Cultural Data Profile (CDP) through DataArts. In Oakland, CDPs are available for 82 non-profit organizations that have applied to major grantmakers. These organizations tend to be older and more formalized, as winning large grants can aid in securing groups over the long term, and vice versa. But there are many other non-profits—at least 135, that we've identified—that contribute to the city's cultural economy and landscape, but that don't have CDPs. Therefore, we've split the analysis of the economic impact of non-profit organizations into two categories, depending on whether or not DataArts CDPs are available.

In this section, Oakland's DataArts non-profits are compared to those in Berkeley and Alameda County as a whole. As in Oakland, the list of non-profits elsewhere in the County is incomplete. But by limiting the analysis in this section to those organizations for which DataArts CDPs are available, we can get a sense for how the ACE non-profit sector in Oakland compares to neighboring cities. In addition, since these geographies differ by size, most of the data are broken down per capita in order to allow for a more meaningful comparison. The population numbers are taken from the Census Bureau's American Community Survey estimates from 2016. The vintage of the CDP data, on the other hand, isn't exact. Since some non-profits complete the DataArts survey every year, while others do so sporadically, we collected all of the CDPs for the region between 2014 and 2016. Then, we went through and removed duplicates, selecting the most recent year for all of the non-profits that appear in the database. The following figures thus represent an estimate for the period from 2014-2016.

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**Table 6: Population, Oakland vs. Other Geographies (2016)**

Geography	Population
Oakland	419,987
Berkeley	121,241
Other AC Cities	1,106,476
<b>Alameda County</b>	<b>1,647,704</b>

Source: U.S. Census Bureau

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**Table 7: Number of Organizations by Budget Size, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

Budget Size	Oakland		Berkeley	
	Number	% Total	Number	% Total
Under \$250,000	49	59.8%	15	35.7%
\$250,000-\$1,000,000	23	28.0%	12	28.6%
\$1,000,000-\$5,000,000	9	11.0%	10	23.8%
\$5,000,000-\$10,000,000	0	0.0%	3	7.1%
Over \$10,000,000	1	1.2%	2	4.8%
<b>Total</b>	<b>82</b>	<b>100.0%</b>	<b>42</b>	<b>100.0%</b>

Budget Size	Alameda County	
	Number	% Total
Under \$250,000	68	50.0%
\$250,000-\$1,000,000	40	29.4%
\$1,000,000-\$5,000,000	21	15.4%
\$5,000,000-\$10,000,000	3	2.2%
Over \$10,000,000	4	2.9%
<b>Total</b>	<b>136</b>	<b>100.0%</b>

Source: DataArts

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Oakland had the largest number of DataArts non-profits in the County (82, 60.3% of total). It had almost twice as many as Berkeley (42, 30.9% of total). But with roughly one quarter the population, Berkeley had a higher rate per capita than Oakland. There were relatively few organizations in Alameda County outside of these two cultural hubs (12, 8.8% of total), with groups scattered across Alameda, Emeryville, San Leandro, and so on. This means that, with just one third of the population, Oakland and Berkeley were home to nearly all of the County's major ACE non-profits. While this is typical of more historic cities with large social- and human-service sectors, it means that Oakland and Berkeley provide cultural resources to individuals and

communities well beyond their borders. The impacts of Oakland’s non-profit cultural organizations—whether they’re thriving or suffering from displacement—thus reverberate at a regional level.

The majority of Oakland’s DataArts non-profits (59.8%) had annual budgets of \$250,000 or less. This represented a greater share than at the County level (50.0%) and a significantly greater share than in Berkeley (35.7%). Oakland had only 10 DataArts non-profits with budgets over \$1 million (12.2% of total), while Berkeley had 15 (35.7% of total). With organizations like the Berkeley Repertory Theatre, California Shakespeare Theater, and Freight & Salvage, Berkeley was home to over half of the organizations in Alameda County with budgets over \$1 million. Oakland, on the other hand, was home to Bay Area Children’s Theater, California Humanities, Community Works West, Creative Growth Art Center, Destiny Arts Center, East Bay Performing Arts/Oakland Symphony, Project Bandaloop, the Crucible, the Oakland Museum of California, and Youth Radio.

**Table 8:**  
**Revenue by Source, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

Revenue	Oakland			Berkeley		
	Number	% Total	Per Capita	Number	% Total	Per Capita
Operating Income - Program	\$21,031,138	38.7%	\$50.08	\$39,243,406	43.5%	\$323.68
Operating Income - Non-Program	\$1,931,996	3.6%	\$4.60	\$6,310,685	7.0%	\$52.05
Investment Income	\$465,838	0.9%	\$1.11	\$2,860,933	3.2%	\$23.60
<b>Total Earned Income</b>	<b>\$23,428,972</b>	<b>43.1%</b>	<b>\$55.78</b>	<b>\$48,415,024</b>	<b>53.7%</b>	<b>\$399.33</b>
Donations - Board	\$927,731	1.7%	\$2.21	\$4,363,385	4.8%	\$35.99
Donations - Individual	\$7,443,609	13.7%	\$17.72	\$10,629,662	11.8%	\$87.67
Donations - Corporate	\$1,221,068	2.2%	\$2.91	\$3,759,667	4.2%	\$31.01
Grants - Foundation	\$10,379,274	19.1%	\$24.71	\$8,321,952	9.2%	\$68.64
Grants - City	\$3,205,982	5.9%	\$7.63	\$298,087	0.3%	\$2.46
Grants - County	\$701,603	1.3%	\$1.67	\$22,100	0.0%	\$0.18
Grants - Tribal	\$4,500	0.0%	\$0.01	\$0	0.0%	\$0.00
Grants - State	\$974,303	1.8%	\$2.32	\$426,519	0.5%	\$3.52
Grants - Federal	\$3,468,074	6.4%	\$8.26	\$959,049	1.1%	\$7.91
<b>Total Contributed Income</b>	<b>\$28,326,144</b>	<b>52.1%</b>	<b>\$67.45</b>	<b>\$28,780,421</b>	<b>31.9%</b>	<b>\$237.38</b>
<b>Other Income</b>	<b>\$2,597,461</b>	<b>4.8%</b>	<b>\$6.18</b>	<b>\$12,987,287</b>	<b>14.4%</b>	<b>\$107.12</b>
<b>Total</b>	<b>\$54,352,577</b>	<b>100.0%</b>	<b>\$129.41</b>	<b>\$90,182,732</b>	<b>100.0%</b>	<b>\$743.83</b>
<b>Average</b>	<b>\$662,836</b>	<b>N/A</b>	<b>N/A</b>	<b>\$2,147,208</b>	<b>N/A</b>	<b>N/A</b>
<b>Median</b>	<b>\$187,224</b>	<b>N/A</b>	<b>N/A</b>	<b>\$482,334</b>	<b>N/A</b>	<b>N/A</b>

Source: DataArts



Table 8 (cont.):

## Revenue by Source, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)

Revenue	Alameda County		
	Number	% Total	Per Capita
Operating Income - Program	\$62,058,543	40.6%	\$37.66
Operating Income - Non-Program	\$9,079,677	5.9%	\$5.51
Investment Income	\$3,339,630	2.2%	\$2.03
<b>Total Earned Income</b>	<b>\$74,477,850</b>	<b>48.7%</b>	<b>\$45.20</b>
Donations - Board	\$5,438,170	3.6%	\$3.30
Donations - Individual	\$20,640,138	13.5%	\$12.53
Donations - Corporate	\$5,539,108	3.6%	\$3.36
Grants - Foundation	\$19,192,925	12.6%	\$11.65
Grants - City	\$3,524,061	2.3%	\$2.14
Grants - County	\$1,248,435	0.8%	\$0.76
Grants - Tribal	\$4,500	0.0%	\$0.00
Grants - State	\$1,431,397	0.9%	\$0.87
Grants - Federal	\$4,826,066	3.2%	\$2.93
<b>Total Contributed Income</b>	<b>\$61,844,800</b>	<b>40.5%</b>	<b>\$37.53</b>
<b>Other Income</b>	<b>\$16,475,997</b>	<b>10.8%</b>	<b>\$10.00</b>
<b>Total</b>	<b>\$152,798,647</b>	<b>100.0%</b>	<b>\$92.73</b>
<b>Average</b>	<b>\$1,123,519</b>	<b>N/A</b>	<b>N/A</b>
<b>Median</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

Source: DataArts

With earned and contributed income combined, Oakland's DataArts non-profits received around \$54 million in revenue (\$129 per capita). While this was above average compared to the County (\$93 per capita), it was significantly less than Berkeley on both a gross (around \$90 million) and per capita (\$744) basis. Indeed, with under 10% of the population, Berkeley's non-profits received more than half of all of the revenue going to DataArts groups in the County.

DataArts provides a detailed breakdown of revenue by source. This reveals that Oakland's non-profits tend to be more dependent on public sources of funding than those in Berkeley or Alameda County as a whole. Oakland outpaced Berkeley in terms of both gross and per capita funding across nearly all of the categories of public-sector support. In particular, Oakland-based organizations received far more in City funding (around \$3.2 million) than those in Berkeley (around \$300,000). Oakland-based groups also received around half of all the funding (around \$10 million) from non-profit foundations in the County. Still, at around \$8.3 million, Berkeley-based groups weren't far behind. This means that, per capita, Berkeley actually received far more in foundation funding (\$69) than Oakland (\$25). Berkeley also showed a significant advantage with regard to earned revenue, e.g., operating and investment income, and private contributed income, e.g., donations from individuals,

board members, and corporations. This may reflect the fact that Berkeley is, on average, more affluent than Oakland. But it also likely reflects the fact that its non-profit cultural sector is more aligned with the tastes and experiences of well-to-do residents and corporations. Oakland, on the other hand, features non-profits that tend to serve communities of color and other marginalized groups, often with a focus on social justice. These are communities that, while extremely rich in cultural resources, don't have a lot of surplus income or wealth to donate to non-profit organizations. This also likely explains the disparities in operating income, as the communities served by the non-profit cultural sector in Oakland cannot pay as much for programming as the ones in Berkeley.

**Table 9:**  
**Expenditures by Type, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

<b>Expenditures</b>	<b>Oakland</b>			<b>Berkeley</b>		
	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
Personnel	\$36,115,864	66.3%	\$85.99	\$51,968,196	62.1%	\$428.64
Non-Personnel	\$18,341,630	33.7%	\$43.67	\$31,715,888	37.9%	\$261.59
<b>Total</b>	<b>\$54,457,494</b>	<b>100.0%</b>	<b>\$129.66</b>	<b>\$83,684,084</b>	<b>100.0%</b>	<b>\$690.23</b>
<b>Average</b>	<b>\$664,116</b>	<b>N/A</b>	<b>N/A</b>	<b>\$1,992,478</b>	<b>N/A</b>	<b>N/A</b>
<b>Median</b>	<b>\$128,945</b>	<b>N/A</b>	<b>N/A</b>	<b>\$514,740</b>	<b>N/A</b>	<b>N/A</b>

<b>Expenditures</b>	<b>Alameda County</b>		
	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
Personnel	\$92,376,059	58.1%	\$56.06
Non-Personnel	\$66,697,291	41.9%	\$40.48
<b>Total</b>	<b>\$159,073,350</b>	<b>100.0%</b>	<b>\$96.54</b>
<b>Average</b>	<b>\$1,169,657</b>	<b>N/A</b>	<b>N/A</b>
<b>Median</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

Source: DataArts

This interpretation is further supported by the data on organizational expenditures. On the whole, Oakland's DataArts non-profits dedicated a greater share of their resources to workers (66.3%) than those in either Berkeley (62.1%) or Alameda County (58.1%).

In total, Oakland's DataArts non-profits were staffed by nearly 6,500 individuals, including full-time and part-time employees, contractors, interns, volunteers, and board members (see Table 10 below). Nearly 3,300 of them (50.9% of total) were paid. But only a small number of them (453, 7.0% of total) were employed on a full-time basis. Berkeley's non-profits, on the other hand, engaged more paid and unpaid staff. But a greater percentage of them were part-time, meaning that the city had fewer full-time employees (372, 4.5% of total) than Oakland.

**Table 10:**

**Paid & Unpaid Staff, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

	<b>Oakland</b>			<b>Berkeley</b>		
<b>Paid &amp; Unpaid Staff</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
Full Time Employees	453	7.0%	0.00	372	4.5%	0.00
Part Time Employees	700	10.8%	0.00	1,210	14.6%	0.01
Contractors	2,136	33.0%	0.01	2,077	25.1%	0.02
<i>Total Paid Staff</i>	<i>3,289</i>	<i>50.9%</i>	<i>0.01</i>	<i>3,659</i>	<i>44.3%</i>	<i>0.03</i>
Interns	368	5.7%	0.00	133	1.6%	0.00
Volunteers	2,217	34.3%	0.01	3,988	48.2%	0.03
Board Members	590	9.1%	0.00	487	5.9%	0.00
<i>Total Unpaid Staff</i>	<i>3,175</i>	<i>49.1%</i>	<i>0.01</i>	<i>4,608</i>	<i>55.7%</i>	<i>0.04</i>
<b>Total</b>	<b>6,464</b>	<b>100.0%</b>	<b>0.02</b>	<b>8,267</b>	<b>100.0%</b>	<b>0.07</b>

	<b>Alameda County</b>		
<b>Paid &amp; Unpaid Staff</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
Full Time Employees	857	5.3%	0.00
Part Time Employees	2,005	12.4%	0.00
Contractors	4,503	27.9%	0.00
<i>Total Paid Staff</i>	<i>7,365</i>	<i>45.7%</i>	<i>0.00</i>
Interns	573	3.6%	0.00
Volunteers	7,006	43.5%	0.00
Board Members	1,180	7.3%	0.00
<i>Total Unpaid Staff</i>	<i>8,759</i>	<i>54.3%</i>	<i>0.01</i>
<b>Total</b>	<b>16,124</b>	<b>100.00%</b>	<b>0.01</b>

Source: DataArts

**Table 11:**  
**Audience Attendance, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

	<b>Oakland</b>			<b>Berkeley</b>		
<b>Attendance - Audiences</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
In Person - Paid	337,711	42.9%	0.80	677,904	53.4%	5.59
In Person - Free	449,910	57.1%	1.07	590,845	46.6%	4.87
<b>Total</b>	<b>787,621</b>	<b>100.0%</b>	<b>1.88</b>	<b>1,268,749</b>	<b>100.0%</b>	<b>10.46</b>
<b>Average</b>	<b>9,605</b>	<b>N/A</b>	<b>N/A</b>	<b>30,208</b>	<b>N/A</b>	<b>N/A</b>
<b>Median</b>	<b>2,695</b>	<b>N/A</b>	<b>N/A</b>	<b>3,915</b>	<b>N/A</b>	<b>N/A</b>

	<b>Alameda County</b>		
<b>Attendance - Audiences</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
In Person - Paid	1,069,637	49.6%	0.65
In Person - Free	1,084,825	50.4%	0.66
<b>Total</b>	<b>2,154,462</b>	<b>100.0%</b>	<b>1.31</b>
<b>Average</b>	<b>15,842</b>	<b>N/A</b>	<b>N/A</b>
<b>Median</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

Source: DataArts

In total, Oakland's DataArts non-profits served nearly 800,000 audience members per year, while Berkeley's served nearly 1.3 million. Given that Berkeley's organizations served around 10 times more people than Oakland's per capita, it's clear that Berkeley's non-profits had more of a regional draw than Oakland's. That said, a greater percentage of Oakland's audiences didn't pay admission (57.1%) than Berkeley's (46.6%). While this reflects the fact that Oakland-based groups tend to serve lower-income communities and communities of color, to their great credit, it also limits the amount of resources they can raise through operating revenue, as discussed above. In other words, this community commitment puts them at an economic disadvantage relative to groups in neighboring cities. At the same time, the gap with attendees in Berkeley implies that arts-presenting non-profits in Oakland—even those that are mostly focused on serving residents—have an opportunity to attract a greater share of regional audiences.

The relationship was reversed, however, when it comes to classes and workshops. As shown in Table 11, in that case, Oakland's non-profits served fewer child and adult students at no cost—whether in schools or at arts centers—than Berkeley's. Again, this is consistent with the fact that Berkeley's organizations were, on average, far better funded than Oakland's.

**Table 12:**  
**Class/Workshop Attendance, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

	<b>Oakland</b>			<b>Berkeley</b>		
<b>Attendance - Other</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
Classes/Workshops - Paid	37,244	35.6%	0.09	23,131	4.5%	0.19
Classes/Workshops - Free	26,996	25.8%	0.06	399,811	78.1%	3.30
In School Programs - Free	40,429	38.6%	0.10	89,075	17.4%	0.73
<b>Total</b>	<b>104,669</b>	<b>100.0%</b>	<b>0.25</b>	<b>512,017</b>	<b>100.0%</b>	<b>4.22</b>

	<b>Alameda County</b>		
<b>Attendance - Other</b>	<b>Number</b>	<b>% Total</b>	<b>Per Capita</b>
Classes/Workshops - Paid	62,667	10.1%	0.04
Classes/Workshops - Free	427,807	68.8%	0.26
In School Programs - Free	130,979	21.1%	0.08
<b>Total</b>	<b>621,453</b>	<b>100.0%</b>	<b>0.38</b>

Source: DataArts

The final analysis in this section has to do with direct versus indirect economic impacts. All of the data discussed above have to do with direct economic impacts, which result from the ways in which Oakland's DataArts non-profits spend money on facilities, supplies, programming, employees, and so on. These activities send money directly into the city's ACE. In other words, they stem from and contribute to activity in the arts. But direct economic activity leads to indirect economic activity when the beneficiaries of those first exchanges go on to spend that money elsewhere in the local economy—that is, beyond the arts. For example, when a non-profit purchases art supplies from a local store (direct impact) that store might go on to purchase advertising in the newspaper (indirect impact). Or when a non-profit pays a teaching artist (direct impact) that worker might go on to buy clothing for their children (indirect impact). The economic benefits of the ACE, in other words, go well beyond the immediate activities of local non-profits, as the dollars spent by those organizations continue to circulate throughout the local economy.<sup>6</sup>

The national organization Americans for the Arts (AFTA) has developed an online calculator to estimate these indirect or non-arts impacts.<sup>7</sup> The AFTA calculator starts

<sup>6</sup> The activities of ACE businesses generate indirect economic impacts, as well. But AFTA's method only applies to the non-profit sector. Therefore, a different economic impact model, such as IMPLAN, would be needed to approximate the indirect impacts of for-profit ACE activities.

<sup>7</sup> <http://www.americansforthearts.org/by-program/reports-and-data/research-studies-publications/arts-economic-prosperity-5/use/arts-economic-prosperity-5-calculator>

with two inputs: (1) the amount of money spent by non-profits (Table 9) and (2) the amount of the money spent by non-profit audiences on things like transport costs, meals before or after a show, and, if the patrons are from out of town, hotel rooms. Using their nationwide research, AFTA estimates these expenditures based on audience attendance figures (Table 11). The calculator then models how these dollars circulate through the local economy in order to estimate four types of indirect economic impacts. These are the amounts of FTE, household income, local tax, and state tax generated as a result of this economic activity. In simple terms, the AFTA calculator allows us to estimate the number of jobs, amount of household income, and volume of local and state taxes created outside of the arts due to the activities of Oakland's ACE non-profits.

**Table 13:**  
**Indirect Economic Impacts, DataArts Non-Profits, Oakland vs. Other Geographies (c. 2014-2016)**

Economic Impact	Oakland				
	Direct/Art Impacts	Indirect/Non-Art Impacts			
		FTEs	HH Income	City Taxes	State Taxes
Organizations	\$54,457,494	2,026	\$44,073,539	\$2,052,503	\$3,001,697
Attendees	\$22,705,633	595	\$12,676,328	\$1,015,396	\$1,443,851
<b>Total</b>	<b>\$77,163,127</b>	<b>2,621</b>	<b>\$56,749,867</b>	<b>\$3,067,899</b>	<b>\$4,445,548</b>

Economic Impact	Berkeley				
	Direct/Art Impacts	Indirect/Non-Art Impacts			
		FTEs	HH Income	City Taxes	State Taxes
Organizations	\$83,684,084	3,272	\$62,469,332	\$3,239,411	\$3,867,878
Attendees	\$35,466,001	901	\$18,826,417	\$1,619,023	\$1,809,121
<b>Total</b>	<b>\$119,150,085</b>	<b>4,173</b>	<b>\$81,295,749</b>	<b>\$4,858,434</b>	<b>\$5,676,999</b>

Economic Impact	Alameda County				
	Direct/Art Impacts	Indirect/Non-Art Impacts			
		FTEs	HH Income	City Taxes	State Taxes
Organizations	\$159,073,350	5989	\$124,068,416	\$6,143,418	\$7,906,326
Attendees	\$61,562,525	1582	\$33,372,449	\$2,806,541	\$3,460,054
<b>Total</b>	<b>\$220,635,875</b>	<b>7,571</b>	<b>\$157,440,865</b>	<b>\$8,949,959</b>	<b>\$11,366,380</b>

Source: DataArts, AFTA

In Oakland, expenditures by DataArts non-profits and their audiences indirectly created approximately 2,600 FTEs, \$57 million in household income, and \$3 million and \$4.4 million in City and State taxes, respectively. These figures were considerable, even as they were lower than in Berkeley. It's also important to note that the amount of City taxes generated in Oakland through indirect activity alone (\$3 million)



was roughly equal to the amount that Oakland-based non-profits received from City sources (\$3.2 million – see Table 8).<sup>8</sup> This means that these organizations were more-or-less revenue neutral with regard to municipal support.

### Category 3: Other Non-Profits

This category includes the remaining 135 non-profits for which DataArts CDPs aren't available. We generated this list through a series of filters. First, we started with the full list of community-serving organizations identified for the cultural asset map. As described elsewhere in the Cultural Plan, this list consists of organizations that have been funded and/or recognized in recent years by the main grantmakers in the arts in Oakland, including: the City of Oakland's Cultural Affairs Division, the California Arts Council, California Humanities, Community Arts Stabilization Trust, the Akonadi Foundation, the Rainin Foundation, the Hewlett Foundation, DataArts, and Americans for the Arts. It also includes all additional organizations that work in the arts, culture, and humanities according to GuideStar. This full list included many organizations that, although they use arts and cultural programming to accomplish their community-serving goals, aren't primarily focused on arts and culture (e.g., health service and social justice organizations) or aren't incorporated as non-profits. The latter were removed to Category 4. The former, however, were removed from this economic impact analysis entirely since it was impossible to tell what share of their programmatic activities were dedicated to arts and culture versus their principle services. Finally, we removed the 82 organizations from Category 2. This left us with 135 other non-profits that contribute to Oakland's ACE.

While detailed data like those provided by DataArts aren't available for these 135 organizations, we were able to collect data on direct expenditures and employment for a majority of them using other records, such as those reported to the IRS on their Forms 990, or those reported to the City of Oakland as part of the Cultural Funding Program. That said, these data appear to be less accurate than those from DataArts. For example, many of the Forms 990 found using GuideStar reported that employment figures for non-profit organizations weren't available. In those cases, rather than estimate, we've simply counted these records as zero, meaning that these figures likely underestimate the true economic impact of these 135 organizations.

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<sup>8</sup> This estimate of annual contributed income from the City (\$3.2 million) significantly exceeds the amount dispersed each year through the Cultural Funding Program, which hovers around \$1 million annually. This implies that ACE non-profits fund their work, in part, through other municipal program areas (e.g., child and youth services), which are often aligned with their social service and community development aims.

**Table 14: Direct Expenditures and Employees<sup>9</sup>, Other (2017) vs. DataArts Non-Profits (c. 2014-2016)**

<b>Direct Impacts</b>	<b>Other Non-Profits</b>	<b>DataArts Non-Profits</b>	<b>All Non-Profits</b>
Total Expenditures	\$28,262,052	\$54,457,494	\$82,719,546
Average Expenditures	\$209,349	\$664,116	\$873,465
Total Employees	336	1,153	1,489

Sources: Cultural Affairs Division, CAST, Akonadi/Rainin Foundations, GuideStar

In total, the 135 other non-profits spent approximately \$28 million in 2017.<sup>10</sup> On average, these organizations spent only one third of what the DataArts non-profits did. This confirms that groups that apply for major grants, and thus participate in DataArts, tend to have larger budgets than those that do not. This can be seen in Table 15, which shows that 72.6% of the other non-profits, versus 59.8% of the DataArts ones, operated with budgets of less than \$250,000. Combined, then, Oakland's arts and culture non-profits spent nearly \$83 million in an average year.

In addition, the other non-profits employed 336 people on a full-time or part-time basis, meaning that—all told—at least 1,489 people were employed directly by the city's ACE non-profits. Combined with the employment figures for the ACE businesses above, this means that, between the for-profit and the non-profit sectors, the city's ACE directly employed over 5,554 full-time or part-time workers.

**Table 15: Number of Organizations by Budget Size, Other (2017) vs. DataArts Non-Profits (c. 2014-2016)**

<b>Budget Size</b>	<b>Other Non-Profits</b>		<b>DataArts Non-Profits</b>		<b>All Non-Profits</b>	
	<b>Number</b>	<b>% Total</b>	<b>Number</b>	<b>% Total</b>	<b>Number</b>	<b>% Total</b>
Under \$250,000	98	72.6%	49	59.8%	147	67.7%
\$250,000-\$1,000,000	19	14.1%	23	28.0%	42	19.4%
\$1,000,000-\$5,000,000	6	4.4%	9	11.0%	15	6.9%
\$5,000,000-\$10,000,000	1	0.7%	0	0.0%	1	0.5%
Over \$10,000,000	0	0.0%	1	1.2%	1	0.5%
N/A	11	8.1%	0	0.0%	11	5.1%
<b>Total</b>	<b>135</b>	<b>100.0%</b>	<b>82</b>	<b>100.0%</b>	<b>217</b>	<b>100.0%</b>

Sources: Cultural Affairs Division, CAST, Akonadi/Rainin Foundations, GuideStar

<sup>9</sup> This includes full-time and part-time employees working directly for ACE non-profits.

<sup>10</sup> The actual 12-month period covered by these data differ for different organizations depending on the last fiscal year in which reporting occurred.

**Table 16:**  
**Indirect Economic Impacts, Other (2017) vs. DataArts Non-Profits (c. 2014-2016)**

<b>Economic Impacts</b>	<b>Other Non-Profits<sup>1</sup></b>	<b>DataArts Non-Profits<sup>2</sup></b>	<b>All Non-Profits</b>
Direct - Expenditures	\$28,262,052	\$54,457,494	\$82,719,546
Indirect - FTEs	1,051	2,621	3,672
Indirect - HH Income	\$22,873,044	\$56,749,867	\$79,622,911
Indirect - City Taxes	\$1,065,197	\$3,067,899	\$4,133,096
Indirect - State Taxes	\$1,557,804	\$4,445,548	\$6,003,352

1 Based on organizational expenditures alone

2 Based on organizational expenditures and audience expenditures

*Sources: Cultural Affairs Division, CAST, Akonadi/Rainin Foundations, GuideStar*

As of 2017, the activities of the other non-profits indirectly created an additional 1,051 FTEs, around \$23 million in household income, and \$1 million and \$1.5 million in City and State taxes, respectively. Along with the impacts generated by the DataArts organizations, then, Oakland's ACE non-profits indirectly generated an additional 3,672 FTEs, around \$80 million in household income, and \$4.1 million and \$6 million in City and State taxes. It should be noted that while the indirect impacts for the DataArts non-profits are based on both organizational and audience expenditures, the impacts for the other non-profits are based on organizational expenditures alone because we don't have estimates of their audiences. This means that these figures are an underestimation of the total indirect impacts of Oakland's ACE non-profits.

## Category 4: Informal Groups

In addition to all of the businesses and non-profits analyzed above, our cultural asset mapping identified over 35 community-serving organizations that either operate as informal collectives—as neither for-profit nor non-profits entities—or as businesses that, due to the inevitable incompleteness of the data, weren't captured by Dun & Bradstreet in Category 1. These include several organizations that have a significant and recognizable impact on the city's cultural landscape, such as CultureStrike, Oakland Carnival, People's Kitchen Collective, Rock Paper Scissors Collective, PLACE for Sustainable Living, and Qilombo Community Center. Clearly, these groups—and others in this category—have an impact on the city's ACE. So while their position in the informal zone between for-profit and non-profit organizations means that numerical data on their operations aren't available, it's still important to include them in the overall picture of the ACE.

These tend to be groups that are recognizable to many residents and outsiders alike as a crucial part of the identity of Oakland as a place that's given rise to a unique union of cultural creativity and social justice. In this sense, they contribute to not only the dollars and cents of the city's ACE, but also a deeply valuable sense of belonging among the often marginalized individuals and communities that they serve. And yet, they do so with small and at-times volatile budgets; insecure access to space; informal support systems of participants, volunteers, and staff; and few, if any, opportunities for institutional funding.

## Future Directions for Research

The difficulty of accounting for these informal groups within Oakland's cultural economy and landscape points to the need for additional research that pushes beyond the "usual sources" of information on economic impacts, audiences, etc. collected by public and private institutions about the "usual suspects" within the city's ACE. In fact, we've identified several avenues for additional research that could, in the future, guide the work of the Cultural Affairs Division and allied agencies.

1. **Informal Groups:** It would be valuable to conduct focus group-style research among some of the informal groups from Category 4. The concern is not so much their economic or programmatic impacts as their operations. In other words, how do they fund themselves? What innovative or hybrid approaches do they use that might draw from the for-profit and non-profit sectors alike? How do their participants and staff define the value of their work, if not in terms of full-time employment? Are there any demographic or socio-economic differences between arts and cultural workers who opt to pursue these informal models? If so, why? Is this a matter of choice, constraint, or both?
2. **Longevity of Groups:** Despite the fact that Oakland's ACE non-profits tend to be smaller and less resourced than those in neighboring Berkeley, they've still managed to provide the city and their constituents with indispensable services. In other words, they've demonstrated a remarkable combination of ingenuity and longevity. It would thus be valuable to get a sense for the age of local ACE non-profits, as longevity amidst disinvestment is a sign of resiliency. This could be accomplished by using CDPs for the DataArts organizations and IRS Forms 990 (found on GuideStar) for the remaining non-profits. At the same time, it would be valuable to link these data on longevity to the data on grantmaking collected elsewhere as part of the Cultural Plan. This would provide insights into whether there's a significant correlation between grants and longevity among organizations in this sector.

3. **Demographics by Discipline:** As noted above, while Oakland's ACE is likely a key realm of opportunity for entrepreneurs of color, there are still significant disparities in terms of the economic performance of different disciplines. But we don't know who owns or works for creative firms across these disciplinary divides (i.e., below the 2-digit NAICS level). It would thus be valuable to analyze the demographic and socio-economic characteristics of owners and workers across different sectors of the ACE. This might be done by using Census data on workers by occupation in ways that roughly align with the NAICS-based definitions of disciplines used above. With the rising cost of living, it's critical that the City use all of its available resources to promote economic opportunity among the residents most vulnerable to displacement. Clearly, the ACE is a viable path to employment, small-business ownership, and wealth creation, as well as expression. But opportunities and access are likely distributed unevenly across different sectors. Hence, it's important to build up those sectors that most benefit long-time residents from historically marginalized communities, while also improving access to those sectors like Literary Arts and Design that are most remunerative.
4. **Alternative Disciplines:** Although the disciplines used in this report reflect some of particularities of Oakland, versus standard definitions, they're still focused on activities that benefit from the imprimatur of "the arts." While there are real disparities across disciplines, on the whole, these activities are often somewhat exclusive as participation in the arts can be guarded through expensive equipment and training requirements, cultures of professionalism, and elitist networks. There are other sectors, however, that offer residents more accessible opportunities for creative expression and economic gain. Moreover, these activities are a vibrant part of Oakland's cultural scene. In particular, it would be valuable to conduct further research on the economic and demographic contours of individuals and small businesses working in Apparel (clothing design, screen printing, alterations, piecework, retail, etc.) and Body Arts (hair, make up, nails, tattoos). In terms of economic impacts, the methodology used in this report could be repeated using EconoVue/D&B, only with a different set of NAICS codes. In terms of demographic impacts, however, an approach similar to the one discussed in Item 2 would need to be devised.
5. **Indirect Economic Impacts of ACE Businesses:** We used AFTA's calculator to estimate the indirect economic impacts of ACE non-profits. But the buying and selling of goods and services conducted by the city's ACE businesses also generates indirect economic benefits. Multipliers for private-sector activities are available from IMPLAN. IMPLAN's tools are proprietary. But the City might be able to gain access to them to conduct further modeling by building on its existing relationship with the East Bay Economic Development Alliance.

6. **Individual Artists:** This report focuses on arts and cultural groups—businesses, non-profits, and collectives—rather than individual artists. This is partially a corrective to the misconception that most creative work is done by lone artists. That said, Oakland is home to many individual artists. While often invoked in public policy discussions, they’re not well understood in terms of statistics. It would thus be valuable to do more research on individual artists. One source of information is the Census Bureau, which asks residents periodically about occupation. In the past, the National Endowment for the Arts has also used data from Federal agencies to analyze the population of individual artists by type, race/ethnicity, gender, and income.<sup>11</sup> But no data exists for Oakland in particular. Rather, it gets lumped into the San Francisco-Oakland-Fremont Metropolitan Statistical Area. Taking this kind of approach would provide some insights about self-identified artists for whom art is a primary job. But such an approach would be necessarily incomplete because the number of residents who make art, and thus contribute to the city’s cultural economy and landscape, vastly outstrips the number who identify as artists on such surveys. Indeed, in 2013, the NEA estimated that for every ten people who claim artist as their primary occupation, at least one more makes art as a secondary form of employment.<sup>12</sup> We suspect that the ratio is even higher in Oakland. Further, there are potential equity considerations since, given the extreme cost of living in Oakland, it often requires a certain amount of financial privilege to work as a full-time artist. Therefore, rather than use conventional methods to count the number of “artists,” it would be valuable to develop new and innovative ways to learn about how arts and cultural work are woven into the activities of local residents who either do not or cannot identify as part of a professional artistic class.
7. **Folk Artists and Culture Keepers:** Not all individual artists do the same sort of work, or have the same sort of collective or economic impact. Beyond merely counting all of the artists in the city, it would also be valuable to identify the folk artists and culture keepers that provide not only beautiful artistic goods and services, but also a vital source of cultural continuity, education, and belonging, especially within Oakland’s communities of color. This would likely require working in collaboration with community-based ACE groups and the Alliance for California Traditional Arts to poll their members about local folk artists and culture keepers and the challenges and opportunities they face in their work during a time of deepening displacement.

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11 <https://www.arts.gov/artistic-fields/research-analysis/arts-data-profiles/arts-data-profile-1/dp1-nea-tables-eeo-2006-2010-data>

12 <https://www.arts.gov/artistic-fields/research-analysis/arts-data-profiles/arts-data-profile-3>



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*Cover Photo: Oakland's First Fridays Festival. Photo by Greg Linhares*