

**CITY & COUNTY OF SAN FRANCISCO**

**Office of the Controller**

City Services Auditor

# City Services Benchmarking:

## Museum Services

**March 24, 2015**





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### Summary

The City and County of San Francisco Charter requires the City Services Auditor (CSA) to monitor the level and effectiveness of City services. Specifically, CSA shall review performance and cost benchmarks and conduct comparisons of the cost and performance of San Francisco City government with other cities, counties, and public agencies performing similar functions.

This report uses Fiscal Year (FY) 2010-11 data from the Cultural Data Project (CDP) and self-reported data from two San Francisco museums to provide a benchmarking analysis for museum services. Some of the data provided by CDP is anonymous in that it does not include identifying information for any of the museums it profiles. Nine cities and the counties with which they are affiliated were used for the peer group used in this report. These are Boston, Chicago, Los Angeles, Minneapolis/St. Paul, New York, Philadelphia, Pittsburgh, San Diego, and Washington, DC.

### Key Findings

- **City & County Costs:** Compared to the nine peer jurisdictions, San Francisco supported the second highest number of comparable museums (ten) and contributed the second highest amount of local government funding (\$24 million). However, San Francisco's ten comparable museums did not depend on local government funding as much did as their peers in Los Angeles, Minneapolis/St. Paul, and Chicago. San Francisco's overall subsidy supporting the cost of visitors was less than the peer average.
- **Financial Health:** The metrics used for this report indicate that San Francisco's ten comparable museums were generally above or near the average of peer benchmarks for financial conditions measuring sustainability and efficient use of funds in FY 2010-11.
- **Exhibitions:** San Francisco's eight Art Museums offer slightly fewer exhibitions per million square feet than the peer Art Museum average, while San Francisco's two Natural History & Natural Science Museums offer slightly more than the peer Natural History & Natural Science Museum average.
- **Fulfillment of Educational Mandate:** San Francisco's ten comparable museums attracted notably more children per capita than comparable museums in any other peer jurisdiction. San Francisco's ten comparable museums also attracted the most class and workshop attendees per capita.
- **Usage:** San Francisco's ten comparable museums had the highest number of on-site visitors per museum square foot in FY 2010-11. Similarly, San Francisco's ten comparable museums attracted the highest number of unique web visitors per capita. The City also notably exceeded the peer average with the second highest number of part-time volunteers per capita. However, these same museums attracted a below average percentage of paying visitors to their front doors.

## **Data Sources and Limitations**

The majority of the data used for this report was obtained from the Cultural Data Project (CDP). CDP is one of few sources of comparable national data in the arts and cultural sector. CDP allows arts and cultural organizations to voluntarily self-report financial, programmatic, and operational data into a standardized online form. The Asian Art Museum and the California Academy of Sciences did not submit data to CDP in FY 2010-11. CSA staff collected data from these two museums directly.

Museums report data to CDP on a voluntary basis, often when requested to do so by a funder. Thus, not all comparable museums<sup>1</sup> located in each of the peer jurisdictions are included in the dataset used for this report. Those museums that have reported data to CDP in the past do not necessarily report on an annual basis. Some museums included in the dataset did not report all the data requested by CDP. Metrics used for this report are based in part on what information was most commonly provided to CDP and the most recent fiscal year, FY 2010-11, with information provided by the most museums. See Appendix A for more information on CDP and the other data sources used for this report.

## **San Francisco Museums**

Three museums in San Francisco are included each year in the Mayor's Budget – the Asian Art Museum, the Fine Arts Museums, and the California Academy of Sciences.<sup>2</sup> These three museums absorbed 90% of the City's contributions to comparable museum services in FY 2010-11 and they are the focus of this report. Seven other comparable San Francisco museums are included in the dataset used for this report. CDP provided anonymous data on these seven museums and their identities are unknown.

### ***Asian Art Museum***

The Asian Art Museum houses and provides care, maintenance, security, and display of the City's collection of over 17,000 Asian art pieces; hosts special exhibitions of Asian art from around the world; and produces educational and outreach programs to inform a broad, diverse public about Asian art and culture.

### ***Fine Arts Museums***

The Fine Arts Museums of San Francisco, through the de Young and the Legion of Honor museums,<sup>3</sup> offer residents and visitors to the city an overview of artistic achievement spanning from ancient times to the present. The Fine Arts Museums provide, through the development and utilization of collections, exhibitions, education, and community outreach programs, a rich and diversified experience of art and culture for Bay Area, Northern California, national, and international audiences.

### ***California Academy of Sciences***

The California Academy of Sciences is a multifaceted scientific institution that houses an aquarium, a planetarium, and a natural history museum, and is committed to leading-edge research, educational outreach, and finding new and innovative ways to engage and inspire the public. Although the Academy is made up of

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<sup>1</sup> For the purpose of this report, comparable museums are defined as those that reported data to CDP in FY 2010-11, received local government funding, and share National Taxonomy of Exempt Entities (NTEE) classifications with the Asian Art Museum, Fine Arts Museums, and California Academy of Sciences.

<sup>2</sup> The San Francisco Zoo was not included in the analysis conducted for this report. While the zoo is a publicly funded institution, it is not profiled in the Mayor's Budget. See <http://www.sfmayor.org/Modules/ShowDocument.aspx?documentID=266> for the Mayor's most recent proposed budget.

<sup>3</sup> Although The Fine Arts Museums are comprised of both the de Young and the Legion of Honor, they are counted as one single museum in this report.

many divisions that run its operations, programs, and research departments, the only portion of the Academy that receives funding from the City and County of San Francisco through the budget process is the Steinhart Aquarium. The Steinhart Aquarium is home to 38,000 live animals that represent more than 900 separate species from around the world. Established through a gift to the City, the Aquarium educates the public about aquatic species. The Aquarium has one of the most important fish collections in the world.

### **Peer Jurisdictions**

The peer jurisdictions used in this report (Boston, Chicago, Los Angeles, Minneapolis/St. Paul, New York, Philadelphia, Pittsburgh, San Diego, and Washington, DC<sup>4</sup>) were selected for the following reasons:

- 1) The Asian Art Museum, Fine Arts Museums, and California Academy of Sciences indicate that they benchmark their own performance against museums included in one or more of these peer jurisdictions.
- 2) The peer jurisdictions contributed in FY 2010-11 to local museums that shared National Taxonomy of Exempt Entities (NTEE) classifications with the Asian Art Museum, the California Academy of Sciences, and the Fine Arts Museums. NTEE is the system used by the IRS and the National Center for Charitable Statistics to classify nonprofit organizations. The NTEE for the Asian Art Museum and Fine Arts Museums is “A51 - Art Museums” and the NTEE for the California Academy of Sciences is “A56 - Natural History & Natural Science Museums.”<sup>5</sup>

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<sup>4</sup> Each peer is comprised of museums within affiliated cities and counties (New York includes museums in all five boroughs).

<sup>5</sup> The NTEE code system may not capture all the activities of a museum. For example, the “A56 – Natural History & Natural Science Museum” code fails to reflect that the California Academy of Sciences also includes an aquarium and a planetarium.

The following table (Figure 1) shows the total number of comparable museums in each of the peer jurisdictions (including the Asian Art Museum, Fine Arts Museums, and California Academy of Sciences). For the purpose of this report, comparable museums are defined as those that reported data to CDP in FY 2010-11, received local government funding, and share NTEE classifications with the Asian Art Museum, Fine Arts Museums, and California Academy of Sciences. CDP provided anonymous data on every museum in the table below except the Asian Art Museum and the California Academy of Sciences. CSA staff confirmed with the Fine Arts Museums’ that their information was contained within the CDP dataset.<sup>6</sup> However, the identities of all other museums are unknown.<sup>7</sup>

**Figure 1: Number of Museums per Peer**

	Art Museums	Natural History & Natural Science Museums	Grand Total
New York	21	1	22
San Francisco	8	2	10
Los Angeles	8	0	8
San Diego	4	1	5
Philadelphia	4	0	4
Washington, DC	4	0	4
Minneapolis/St. Paul	2	1	3
Pittsburgh	3	0	3
Chicago	1	1	2
Boston	1	0	1

New York is the only peer jurisdiction that funded more comparable museums than San Francisco in FY 2010-11. New York is a consistent outlier and affects the peer average. For example, while six is the average number of comparable museums that received local government funding, the more useful indicator of the norm among the peers is the median (four).

<sup>6</sup> Although The Fine Arts Museums are comprised of both the de Young and the Legion of Honor, they are counted as one single museum in this report.

<sup>7</sup> CSA reviewed the data to understand which Natural History & Natural Science Museum is associated with San Francisco in the data along with the California Academy of Sciences and believes that The Exploratorium is the appropriate reference.

**City & County Costs**

The following graphs show how peer jurisdictions compared in their gross financial support of museums in FY 2010-11. As Figure 2 shows, New York and Boston are outliers and the chart on the right shows how peers compare when these two cities are excluded.

**Figure 2: Total City & County Support<sup>8</sup> for Comparable Museums**

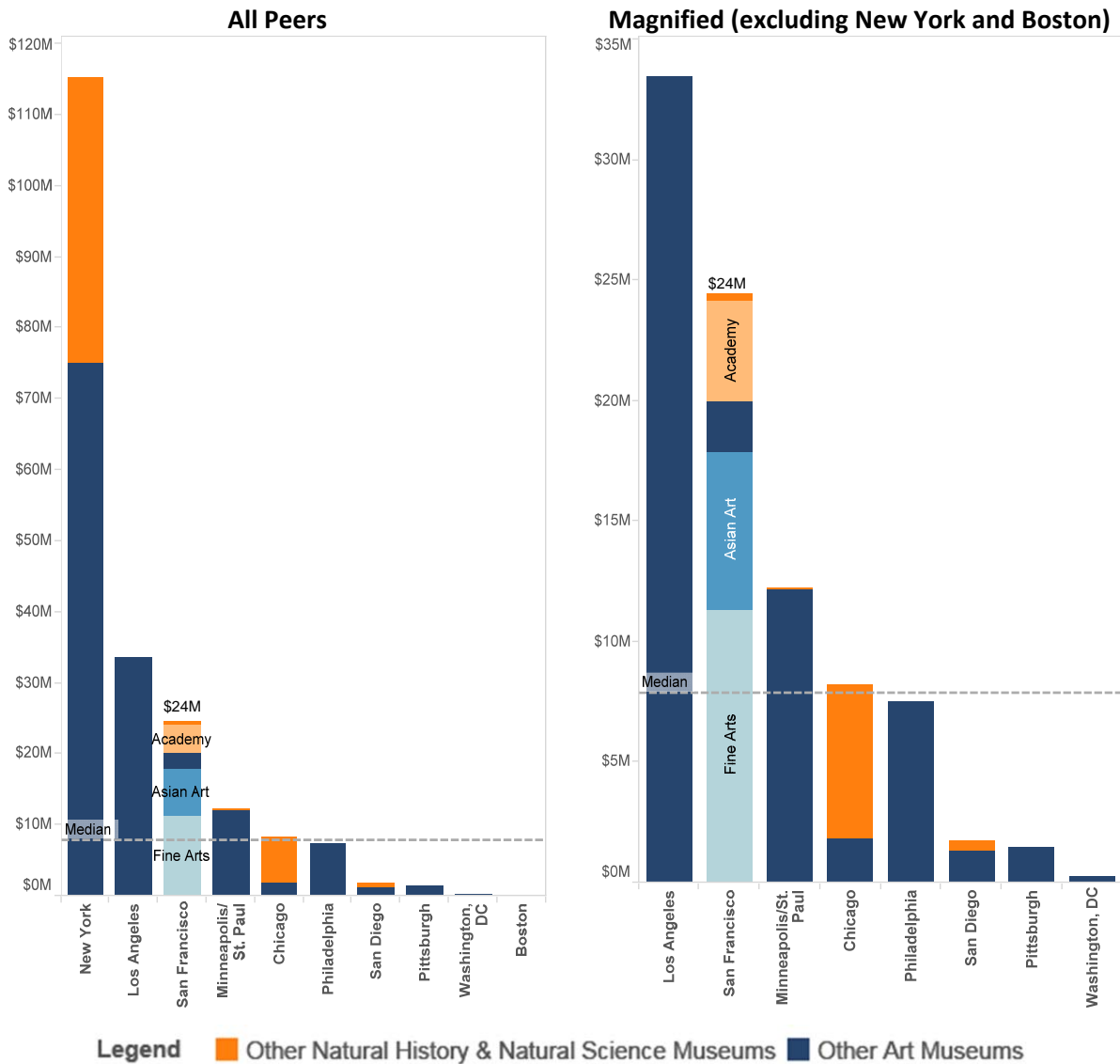
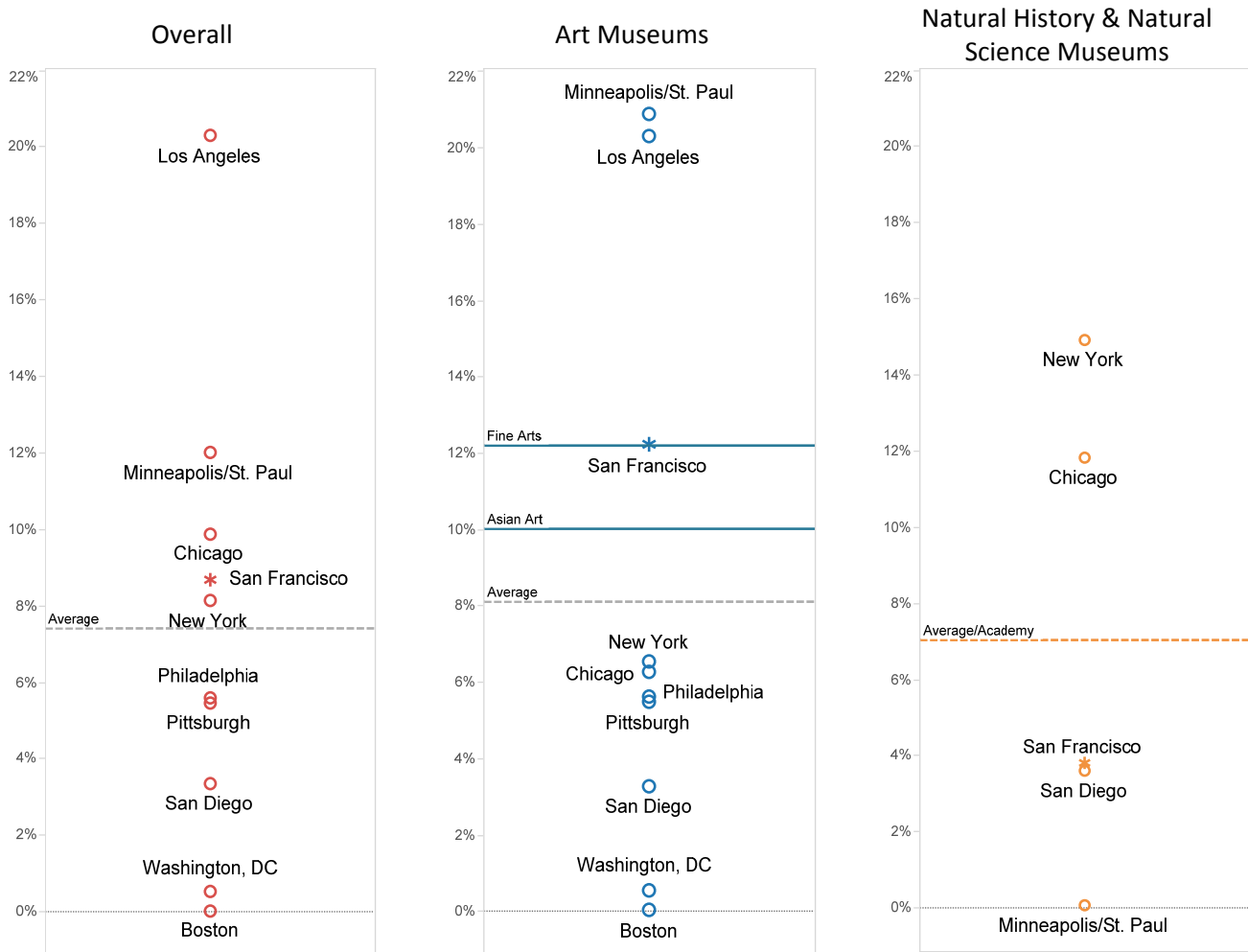


Figure 2 includes the median<sup>9</sup> amount of financial support that comparable museums received (\$8 million). While the amount that San Francisco contributed to its museums was 200% greater than the median, it is notable that Los Angeles contributed \$9 million more than San Francisco to fund two fewer museums.

<sup>8</sup> Comparable San Francisco museums reported multiple different sources of City & County funding, including: Mayor’s Office of Housing; San Francisco Grants for the Arts/Hotel Tax Fund; San Francisco Redevelopment Agency; San Francisco Office of Community Investment and Infrastructure; San Francisco Arts Commission; San Francisco Department of the Environment; Department of Children, Youth, and Their Families; Port of San Francisco; Office of Economic and Workforce Development; and Human Services Agency.

While San Francisco contributed more gross funding than the majority of its peers to its ten comparable museums, museums funded by the City did not depend on local government contributions as heavily as did museums in Los Angeles, Minneapolis/St. Paul, and Chicago. The “Overall” chart at left in Figure 3 shows that the San Francisco’s financial support made up 9% of all revenue received by the ten comparable museums – two percentage points above the peer average. This position is mainly due to San Francisco’s contributions to eight Art Museums with local government support making up 12.2% of San Francisco’s Art Museum revenue – four percentage points more than the peer average of 8%. San Francisco’s financial support of two Natural History & Natural Science Museums overall was lower than the peer average for contributions to such museums, although its support of the California Academy of Sciences by itself was near the peer average.

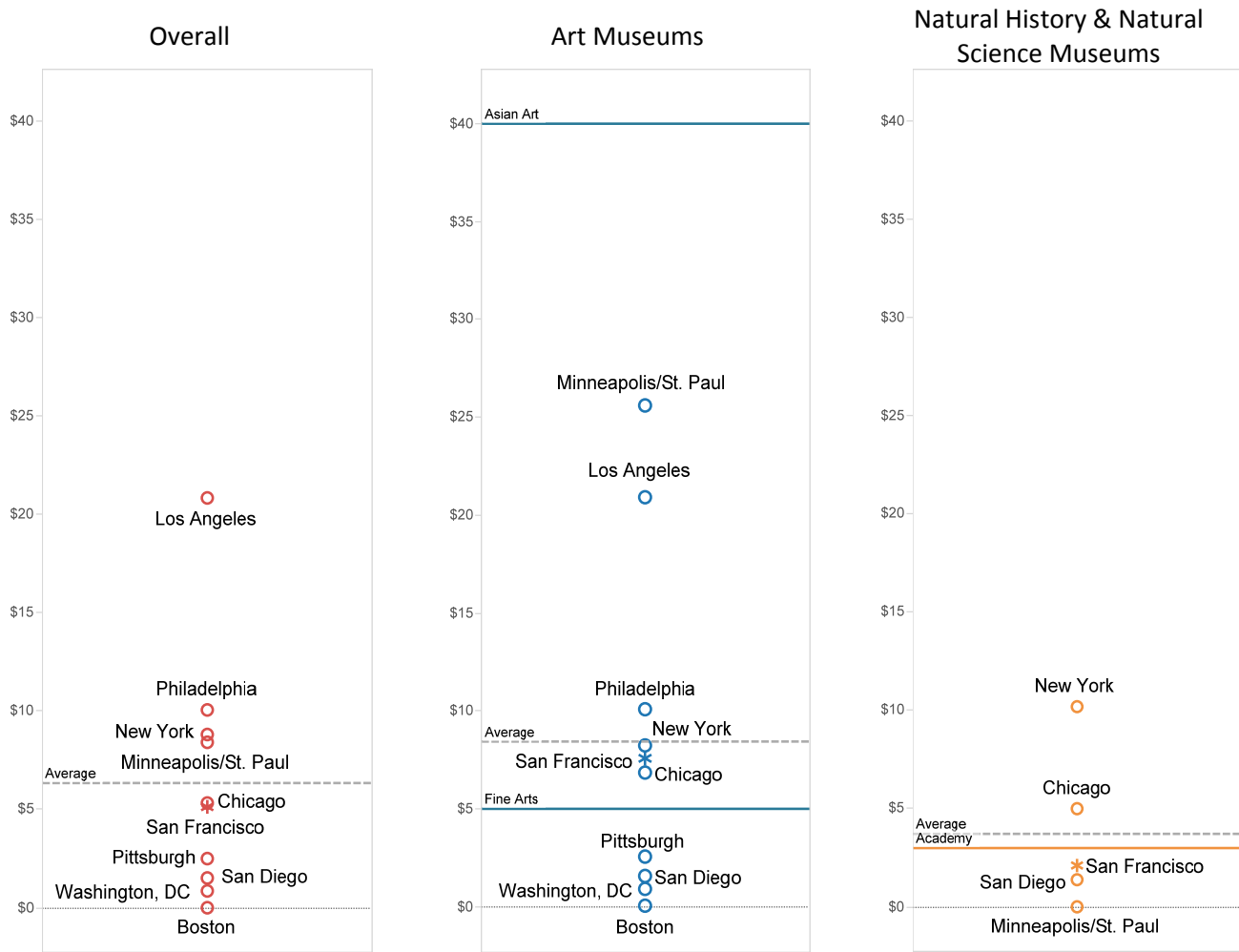
**Figure 3: City & County Support as % of Total Revenue**



<sup>9</sup> This report uses the median instead of the mean average in cases where there are clear outliers. In such cases, the median is a more accurate indicator of the norm among the peers (it reflects the middle value when the values associated with each peer are arranged from largest to smallest).

Figure 4 below illustrates how much local government funding subsidized the cost of visitors to comparable museums.

**Figure 4: City & County Costs per Visitor**



San Francisco subsidized the cost of each visitor at its ten comparable museums by \$1 less than the peer average, spending less than Los Angeles, Philadelphia, New York, Minneapolis/St. Paul, and Chicago (see “Overall” chart above). Pittsburgh, San Diego, Washington, DC, and Boston all contributed less per visitor than San Francisco.

San Francisco subsidizes eight Art Museums at a lower rate than the peer Art Museum average, however the City clearly subsidized the cost of visitors at a higher rate at the Asian Art Museum than at the Fine Arts Museums (see “Art Museums” chart above).

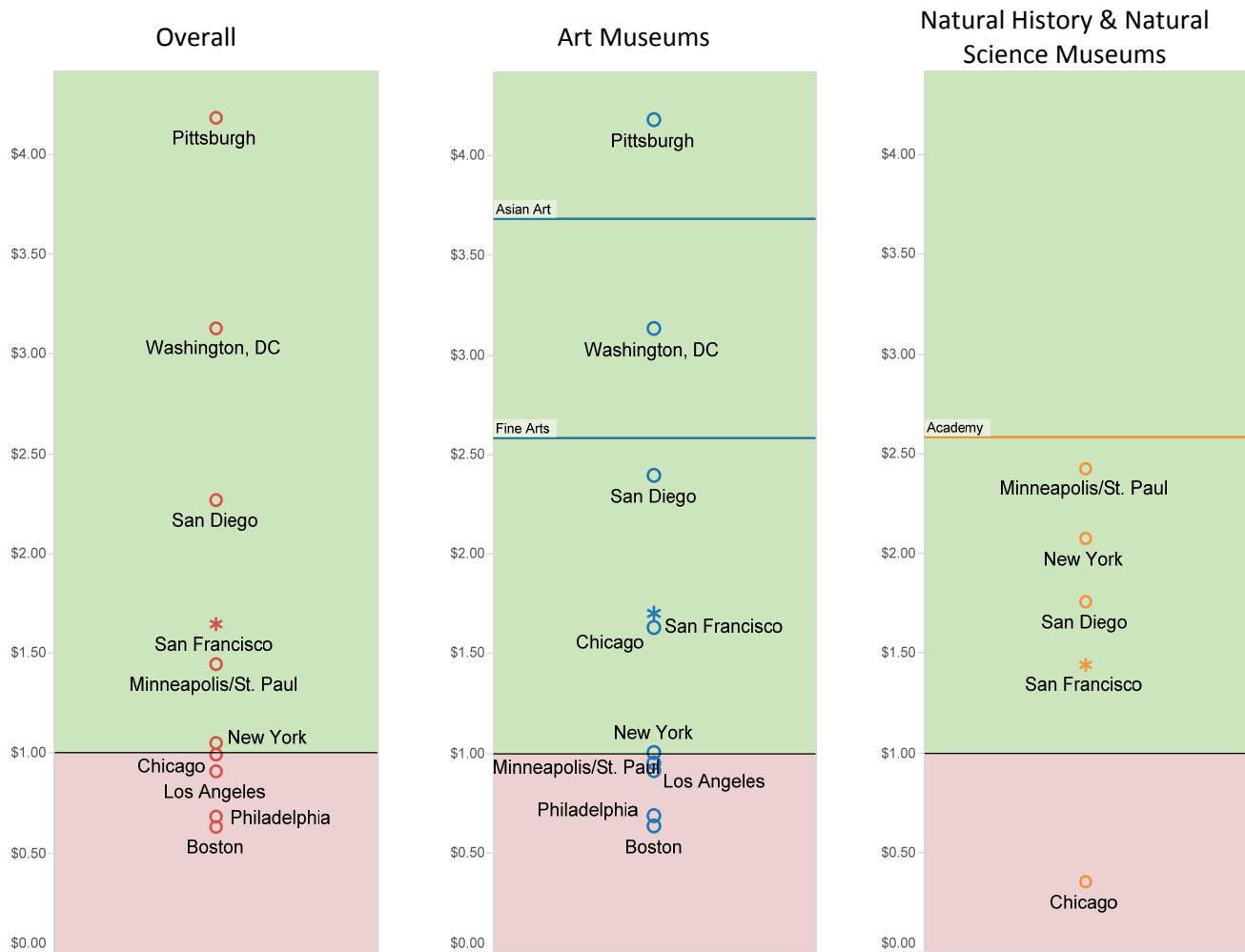
San Francisco subsidizes the cost of visitors to two Natural History and Natural Science Museums at a lower rate than the peer average (see “Natural History & Natural Science Museums” chart above). San Francisco’s subsidy per visitor at the California Academy of Sciences specifically was also slightly lower than this peer average.



**Financial Health**

Museums rely primarily on two major types of revenue – earned revenue and support revenue. Earned revenue comes from income generating activities such as ticket sales, workshop and lecture fees, gift shop and food sales, and investment gains. Support revenue comes from external contributions such as donations, grants, city and county support, and contributions from friends groups. Support revenue also includes net assets released from restrictions. Organizations that receive more earned revenue than support revenue are generally considered to be more sustainable. In Figure 5 below, the jurisdictions with museums that, on average, received more in earned revenue than support revenue are in the green area while those that, on average, relied more on support revenue are in the pink area.

**Figure 5: Earned Revenue for Every \$1 of Support Revenue<sup>10</sup> (on average)**



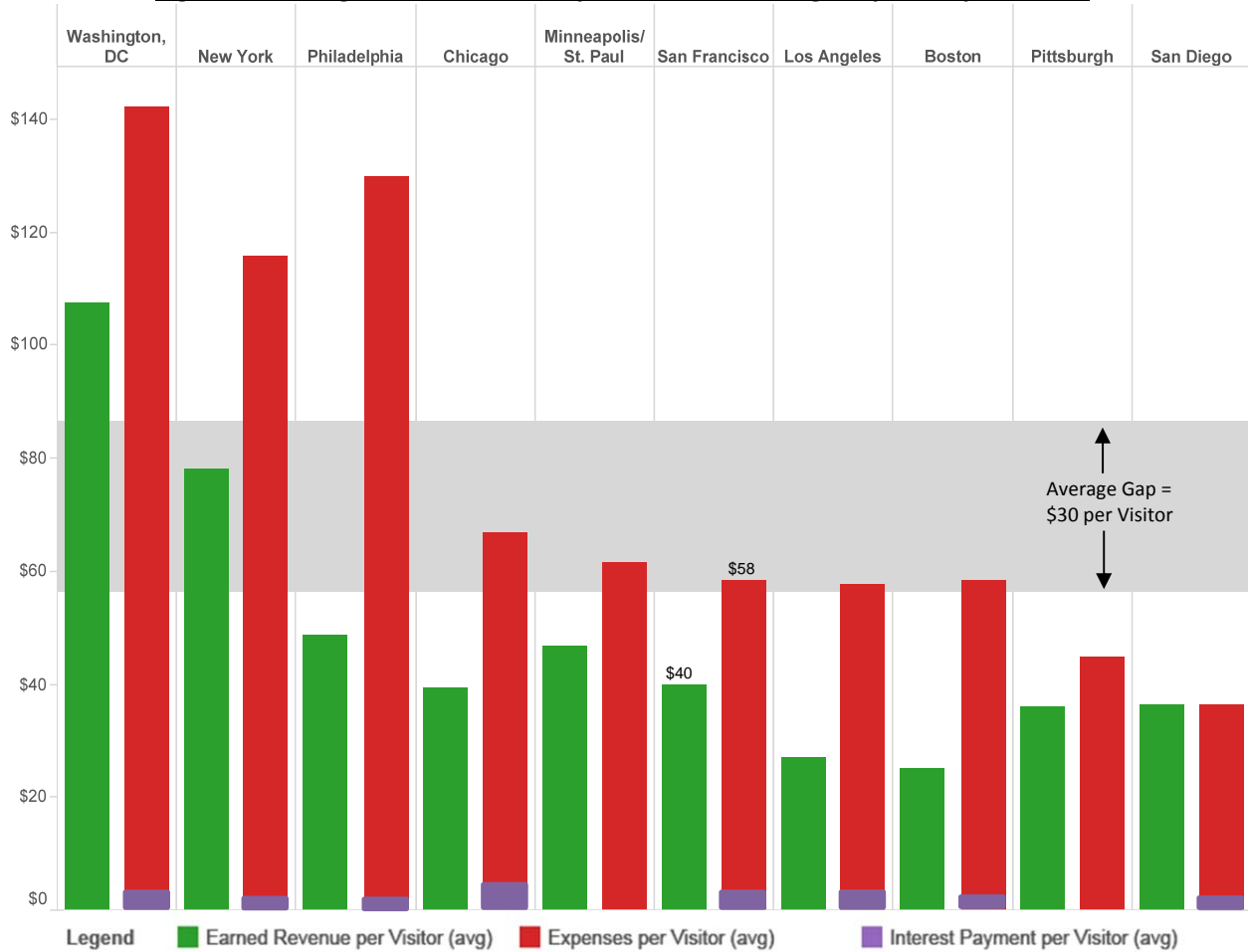
The ten San Francisco museums included in this analysis received, on average, \$1.65 in earned revenue for every \$1 in support revenue in FY 2010-11, suggesting that San Francisco’s museums overall tended to rely more on self-sustaining income generation than on contributions. Art Museums in Pittsburgh, Washington DC, and San Diego averaged more in earned revenue than eight comparable museums in San Francisco (see “Art Museums”

<sup>10</sup> Earned revenue comes from income generating activities (such as ticket sales, workshop and lecture fees, gift shop and food sales, realized investment gains, etc.). Support revenue comes from external contributions (such as donations, grants, city and county support, etc.) and net assets released from restrictions.

chart above). Natural History & Natural Science Museums in Minneapolis/St. Paul, New York, and San Diego also received more in earned revenue than San Francisco’s two comparable museums averaged (see “Natural History & Natural Science” charts above).<sup>11</sup> The Asian Art Museum, Fine Arts Museums, and California Academy of Sciences each demonstrated high rates of earned revenue generation in comparison with averages from each of the peer jurisdictions. The California Academy of Sciences’ rate of earned revenue to support revenue was higher than any of the peer averages for Natural History & Natural Science Museums.

Figure 6 below compares how much comparable museums needed, on average, to bridge the gap between what they received in earned revenue and what they spent per visitor.

**Figure 6: Average Earned Revenue per Visitor v. Average Expenses per Visitor<sup>12</sup>**



Overall, the gap between the average earned revenue per visitor and the average expense per visitor among San Francisco’s ten comparable museums (\$18) was less than most of its peers (namely, Philadelphia, Washington, DC, New York, Los Angeles, Chicago, and Boston). San Diego’s average earned revenue per visit is almost equal to its expenditure. Chicago paid the most in interest on its debts as part of its cost per visitor (\$5).

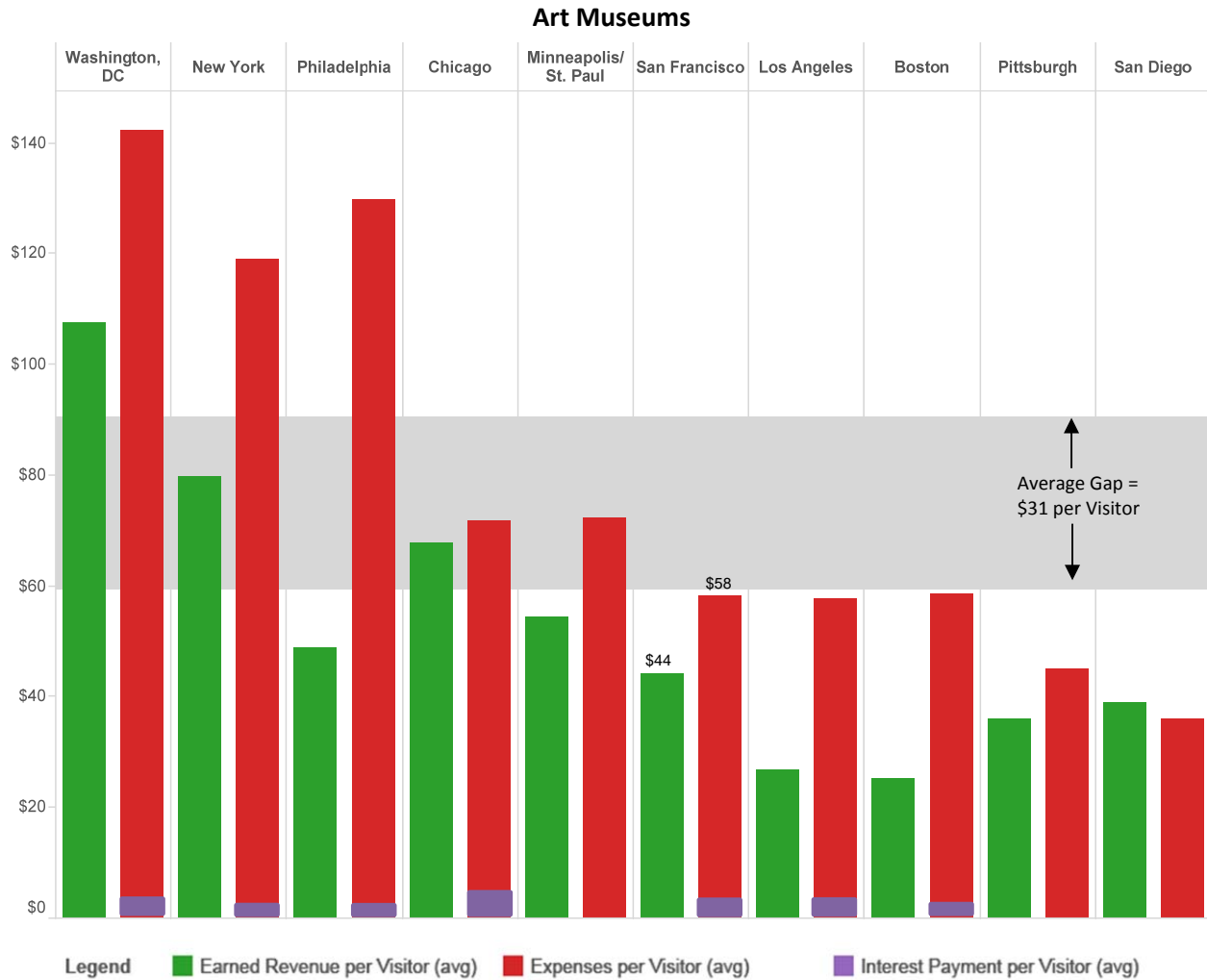
<sup>11</sup> For the purposes of this report, San Francisco is the only peer jurisdiction with more than one Natural History & Natural Science museum.

<sup>12</sup> Earned revenue includes realized and unrealized investment gains as well as income directly generated from museum visitors. Earned revenue does not include contributions (such as donations, grants, city and county contributions, support from friends groups, etc.) or net assets released from restrictions. Expenses include all operational and administrative costs (including debt service).

Minneapolis/St. Paul’s museums averaged less than \$1 in interest payments per visitor and Pittsburgh’s museums did not provide information on how much debt cost they paid in FY 2010-11.

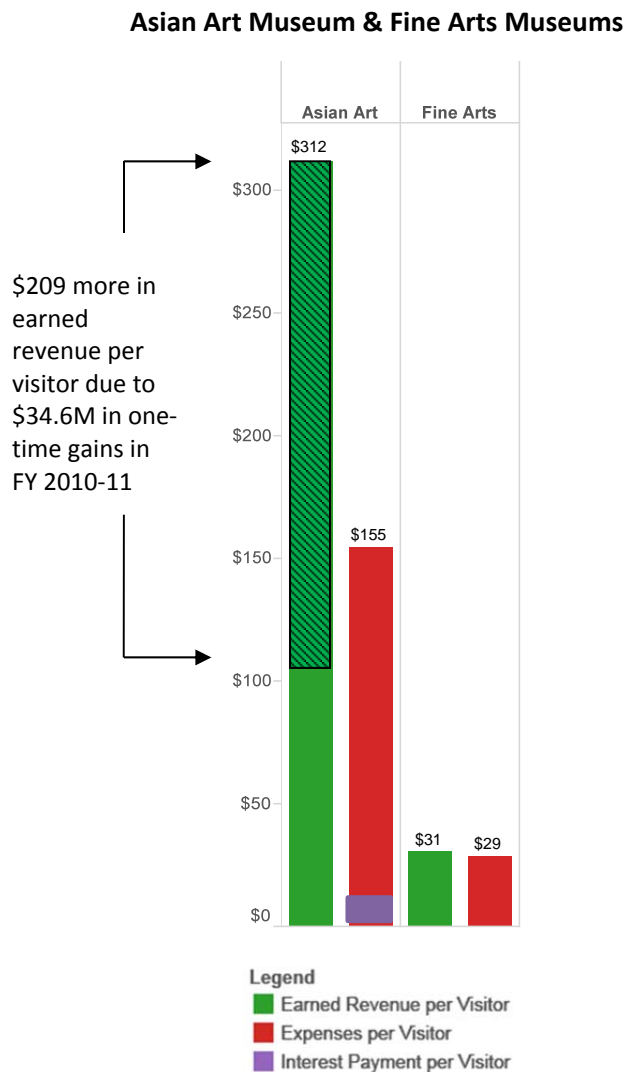
On average, the gap between what San Francisco’s eight comparable Art Museums earned per visitor and what they spent per visitor (\$14) was also smaller than it was for most peers (see “Art Museums” in Figure 6.1 below).

**Figure 6.1: Average Earned Revenue per Visitor v. Average Expenses per Visitor<sup>13</sup>**



<sup>13</sup> Earned revenue includes realized and unrealized investment gains as well as income directly generated from museum visitors. Earned revenue does not include contributions (such as donations, grants, city and county contributions, support from friends groups, etc.) or net assets released from restrictions. Expenses include all operational and administrative costs (including debt service).

**Figure 6.2: Earned Revenue per Visitor v. Expenses per Visitor<sup>14</sup>**



The data also indicates that the Asian Art Museum earned far more per visitor than it spent (see Figure 6.2 to left). The Asian Art Museum received notably more in earned revenue per visitor in FY 2010-11 than any of the peer Art Museum averages shown in Figure 6.1 on the previous page.

According to the Asian Art Museum, this high rate of earned revenue per visitor is an anomaly due to the museum recognizing \$13.6 million in unrealized gain on an interest rate swap agreement and \$21.0 million in realized gain from restructuring a loan related to its move from Golden Gate Park to Civic Center in 2003. As such, the museum reported \$34.6 million more in earned revenue than usual in FY 2010-11. If this refinancing had not occurred, Figure 6.2 would reflect \$103 in earned revenue per visitor for the Asian Art Museum.

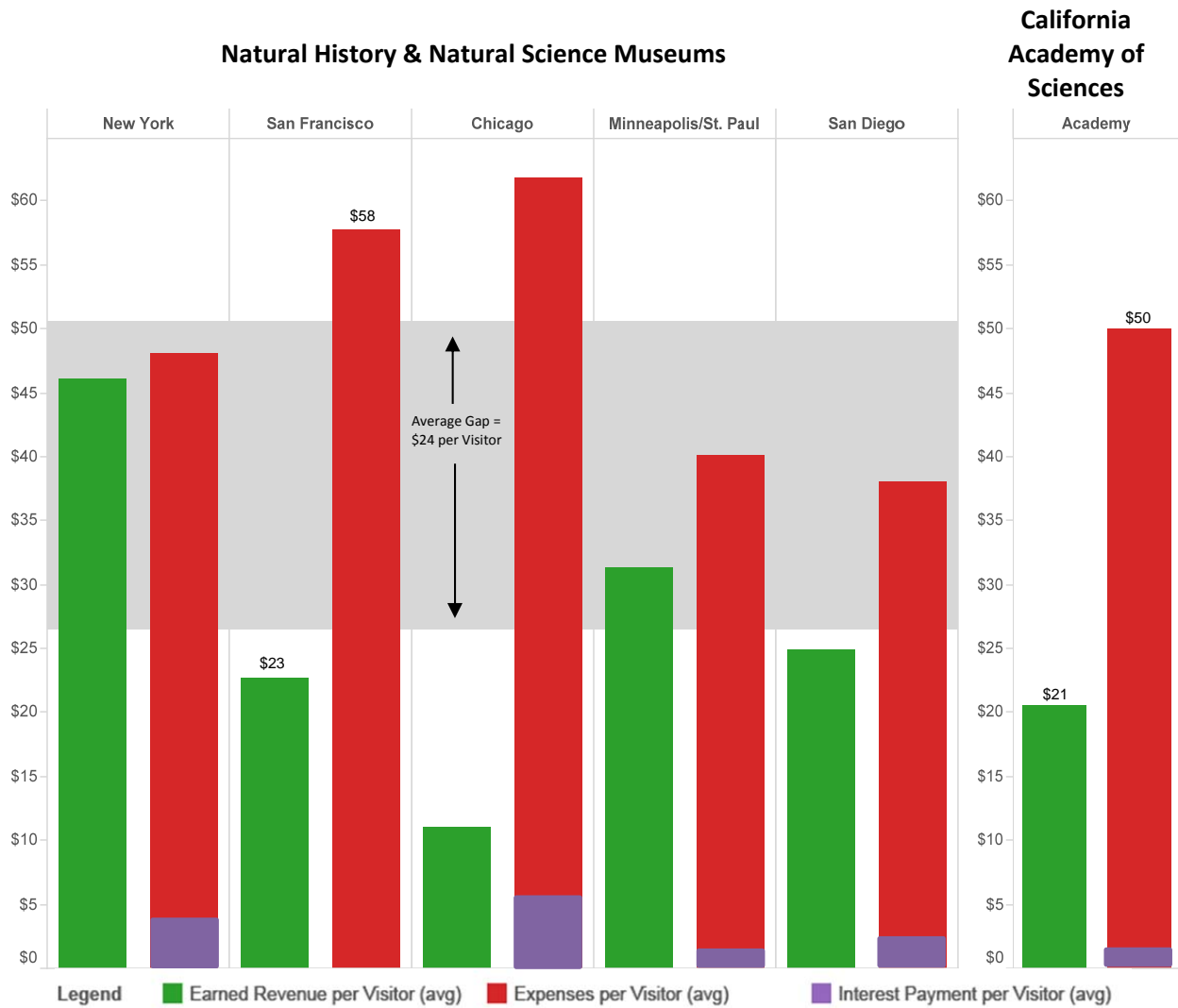
Figure 6.2 also shows that the Fine Arts Museums earned almost as much as they spent per visitor in FY 2010-11. According to the Fine Arts Museums, this result is due to the de Young museum’s free space for on-site visitors that do not pay to visit the museum’s main exhibitions. These visitors include attendees to the de Young’s events on Friday nights.

Finally, the Asian Art Museum paid approximately \$15 per visitor in interest payments on its debts in FY 2010-11. The Fine Arts Museums paid less than \$1 in interest payments per visitor.

Figure 6.2 should not be used to draw material conclusions about the Asian Arts Museum’s financial health since it is based on an atypical earned revenue total.

<sup>14</sup> Earned revenue includes realized and unrealized investment gains as well as income directly generated from museum visitors. Earned revenue does not include contributions (such as donations, grants, city and county contributions, support from friends groups, etc.) or net assets released from restrictions. Expenses include all operational and administrative costs (including debt service).

**Figure 6.3: Average Earned Revenue per Visitor v. Average Expenses per Visitor<sup>15</sup>**



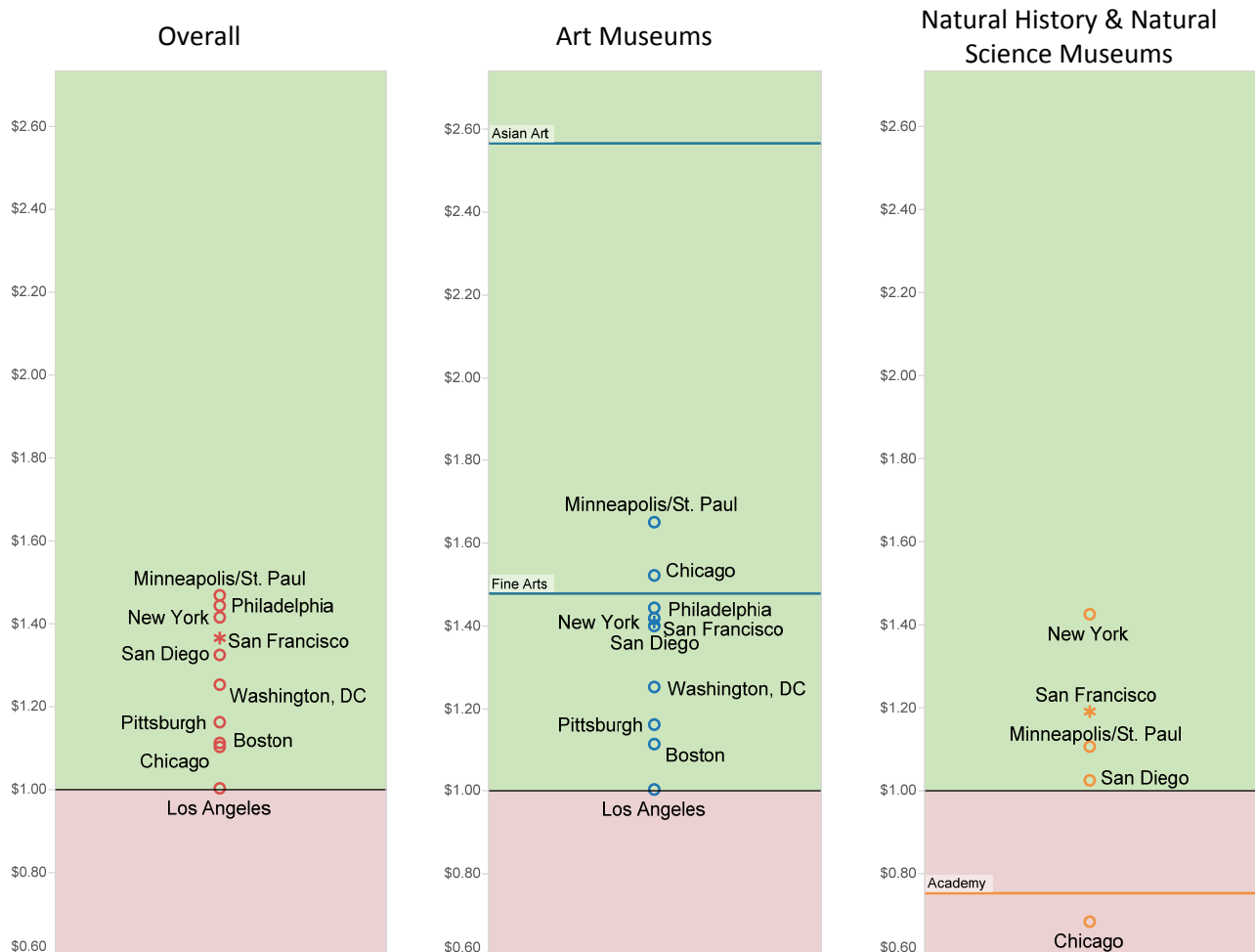
The gap between average earned revenue per visitor and average expenses per visitor was larger for San Francisco’s two Natural History & Natural Science Museums than among its eight Art Museums. In Figure 6.3 above, only Chicago has a larger gap than San Francisco between average earned revenue per visitor and average expenses per visitor. New York’s Natural History & Natural Science Museum<sup>16</sup> earned almost as much in revenue per visitor as it spent. The California Academy of Sciences also needed more in support revenue to finance visitor costs than most of the comparable Natural History & Natural Science museums. However, the California Academy of Sciences also paid less in debt service per visitor (\$1) than the average among most peer jurisdictions.

<sup>15</sup> Earned revenue includes realized and unrealized investment gains as well as income directly generated from museum visitors. Earned revenue does not include contributions (such as donations, grants, city and county contributions, support from friends groups, etc.) or net assets released from restrictions. Expenses include all operational and administrative costs (including debt service).

<sup>16</sup> The data only includes one Natural History & Natural Science museum for New York.

Another way of assessing financial health is to compare the amount of revenue that an organization receives with the amount that it spends (i.e., whether it is able to cover its costs with the revenue it receives). In Figure 7 below, the jurisdictions with museums that, on average, received more in revenue than they spent fall within the green area, while those that, on average, spent more than they received fall within the pink area.

**Figure 7: Revenue for Every \$1 in Expenses<sup>17</sup> (on average)**



As indicated in the “Overall” chart in Figure 7, the ten San Francisco museums included in this analysis earned, on average, \$1.37 in revenue for every dollar spent, ranking fourth overall among the peer jurisdictions for this metric (although the variance between the peer jurisdictions is not large).

As indicated in the “Art Museums” chart, San Francisco’s eight comparable Art Museums received nearly the same amount on average for every dollar they spent; the Fine Arts Museums’ ratio was slightly stronger than the San Francisco average while the Asian Art Museum’s ratio was much stronger (the Asian Art Museum earned nearly \$2.57 in revenue for every dollar spent). As noted previously, the Asian Art Museum received \$34.6 million from the City that year to restructure debt and offset a financial crisis which is reported as earned revenue but is not an indicator of typical earnings for the organization.

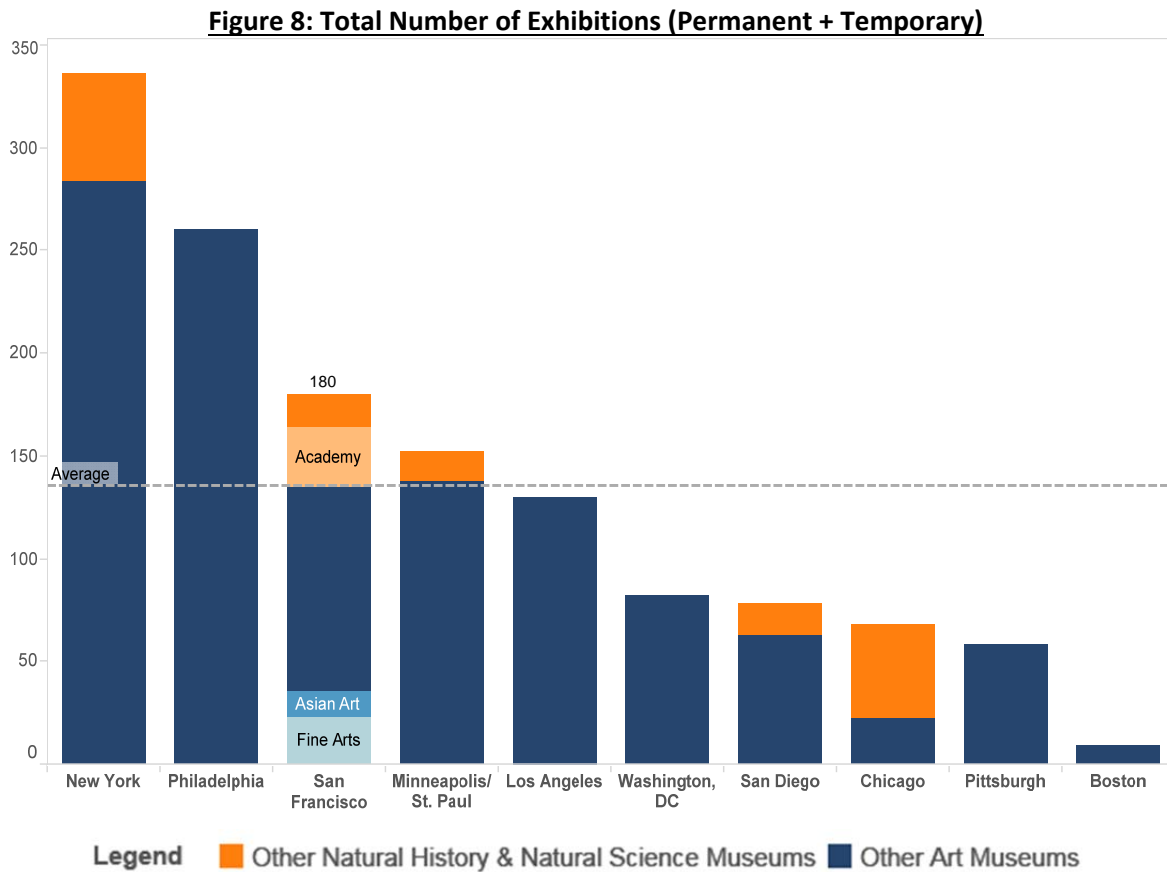
<sup>17</sup> Revenue here is defined as the sum of all earned revenue (ticket sales, workshop and lecture fees, gift shop and food sales, realized investment gains, etc.), support revenue (donations, grants, city and county contributions, support from friends groups, net assets released from restrictions, etc.), and transfers/reclassifications (restricted funds that were released during the year into unrestricted funds). Expenses include all operational and administrative costs (including debt service).

By contrast, the “Natural History & Natural Science” chart in Figure 7 shows that the California Academy of Sciences spent more than it received in FY 2010-11 (although the San Francisco average that accounts for both of its Natural History & Natural Science Museums reflects a more favorable ratio).

The charts in Figure 7 demonstrate that Chicago, Los Angeles, and San Diego had museums that, on average, either ran a deficit or were close to running a deficit in FY 2010-11.

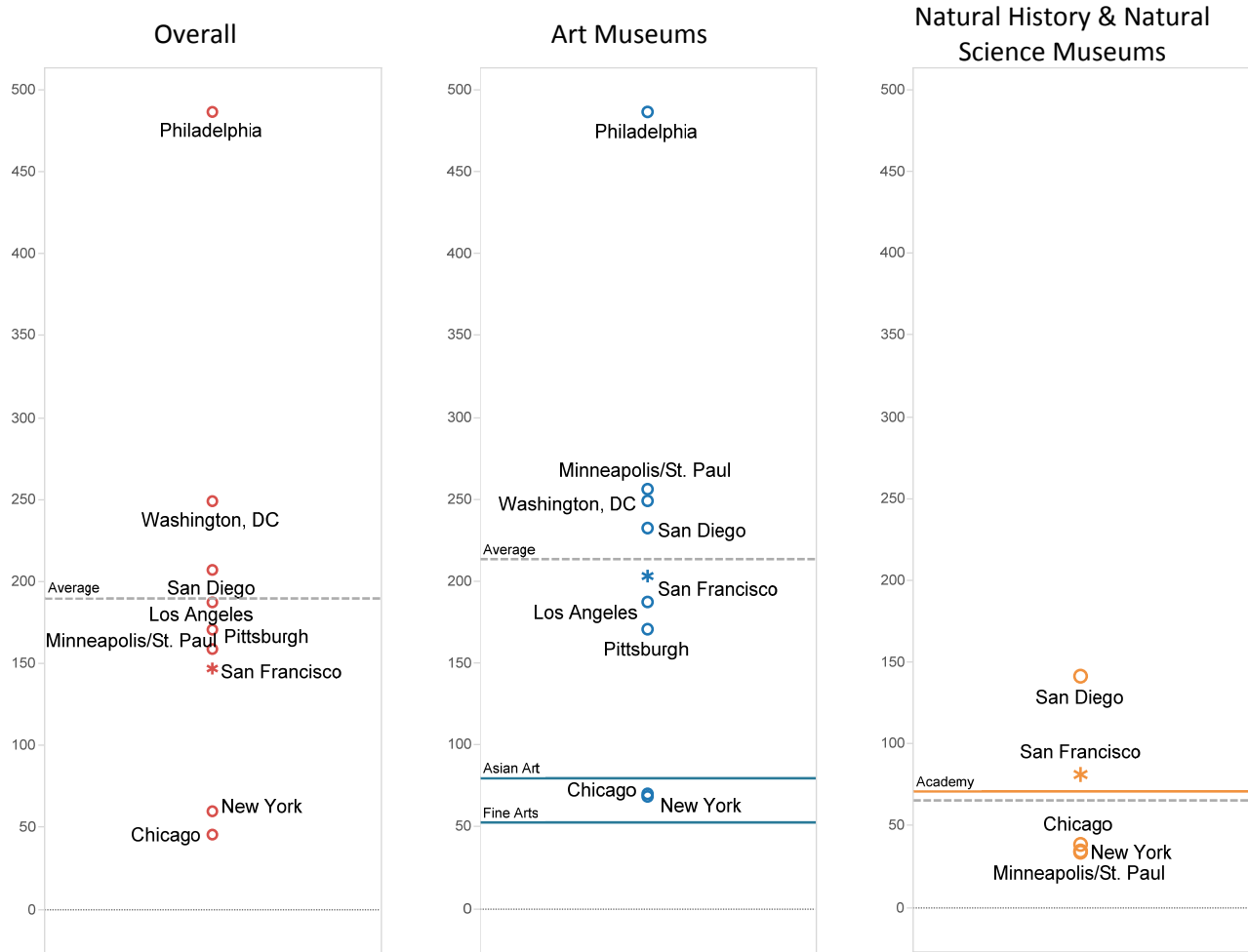
**Exhibitions**

Figure 8 below demonstrates that San Francisco ranks third behind New York and Philadelphia for the gross number of temporary and permanent exhibitions at its ten comparable museums in FY 2010-11, offering 33% more exhibitions to visitors than the peer average.



New York funds the most museums and the most permanent and temporary exhibitions among the peer jurisdictions and these exhibitions also occupy more space overall than the exhibitions at comparable museums in the other peer jurisdictions (see Figure 9 below).

**Figure 9: Total Exhibitions (Permanent + Temporary) per Million Square Feet<sup>18</sup>**



As the “Overall” chart in Figure 9 shows, New York is ranked eighth for number of exhibitions per million square feet, suggesting that New York’s 22 museums included more non-exhibition space and/or showed exhibitions that occupied more space than comparable museums in almost any other peer jurisdiction (except Chicago). The data also suggests that Art Museum exhibitions generally occupied less space than exhibitions at Natural History & Natural Science Museums (see “Art Museum” and “Natural History & Natural Science” charts above).

San Francisco ranks fourth for number of Art Museum exhibitions per million square feet and second for number of Natural History & Natural Science exhibitions per million square feet (see “Art Museum” and “Natural History & Natural Science” charts respectively). San Francisco’s two Natural History & Natural Science Museums have an above average number of exhibitions per million square feet, as does the California Academy of Sciences (see “Natural History & Natural Science” chart above). By contrast, both the Asian Art Museum and the Fine Arts Museums have notably fewer exhibitions per million square feet than average.

<sup>18</sup> The data does not include square footage for Boston’s comparable museum.



**Fulfillment of Educational Mandate**

The number of children that visited comparable museums in each of the peer jurisdictions can be found in Figure 10 below.

**Figure 10: Total Number of On-Site Child Visitors**

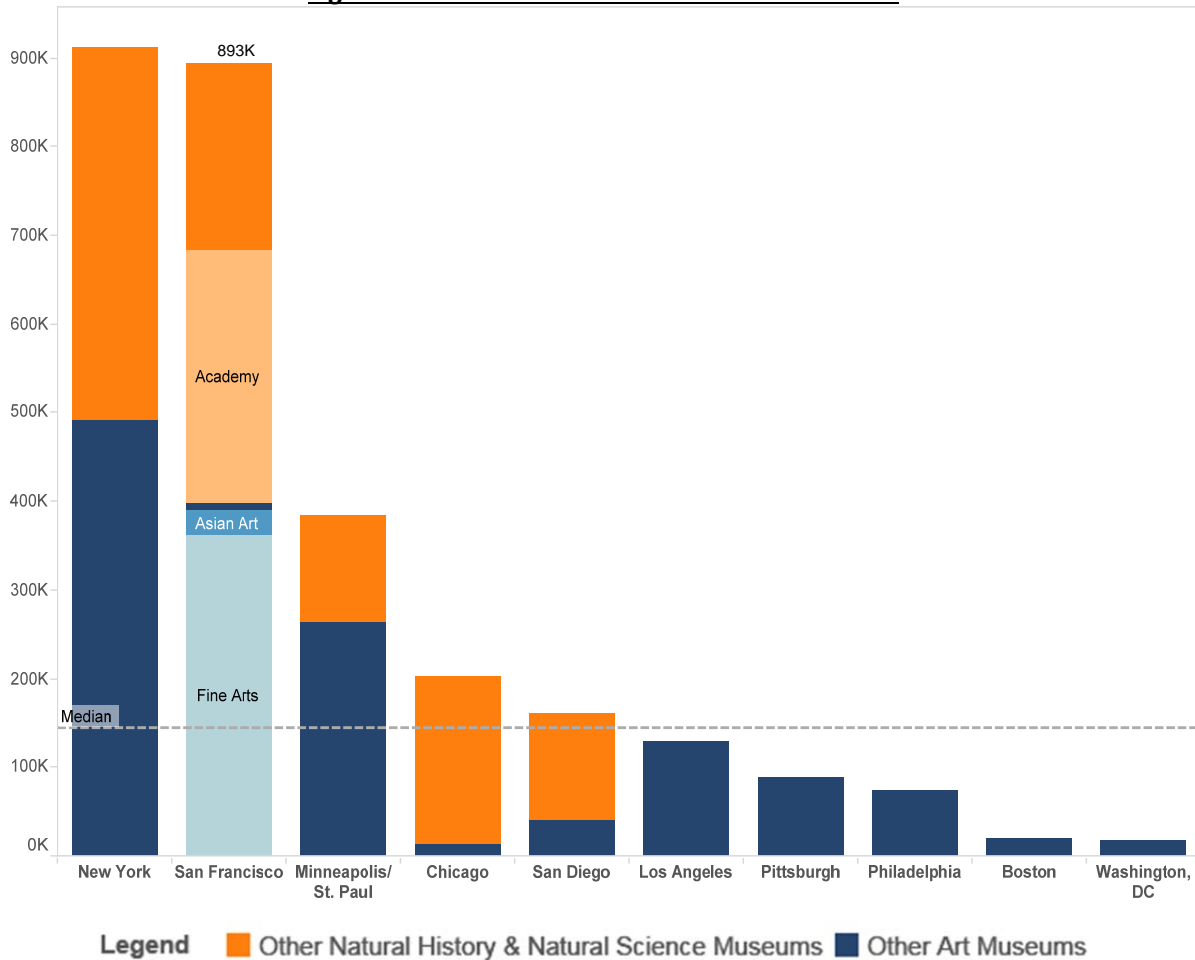
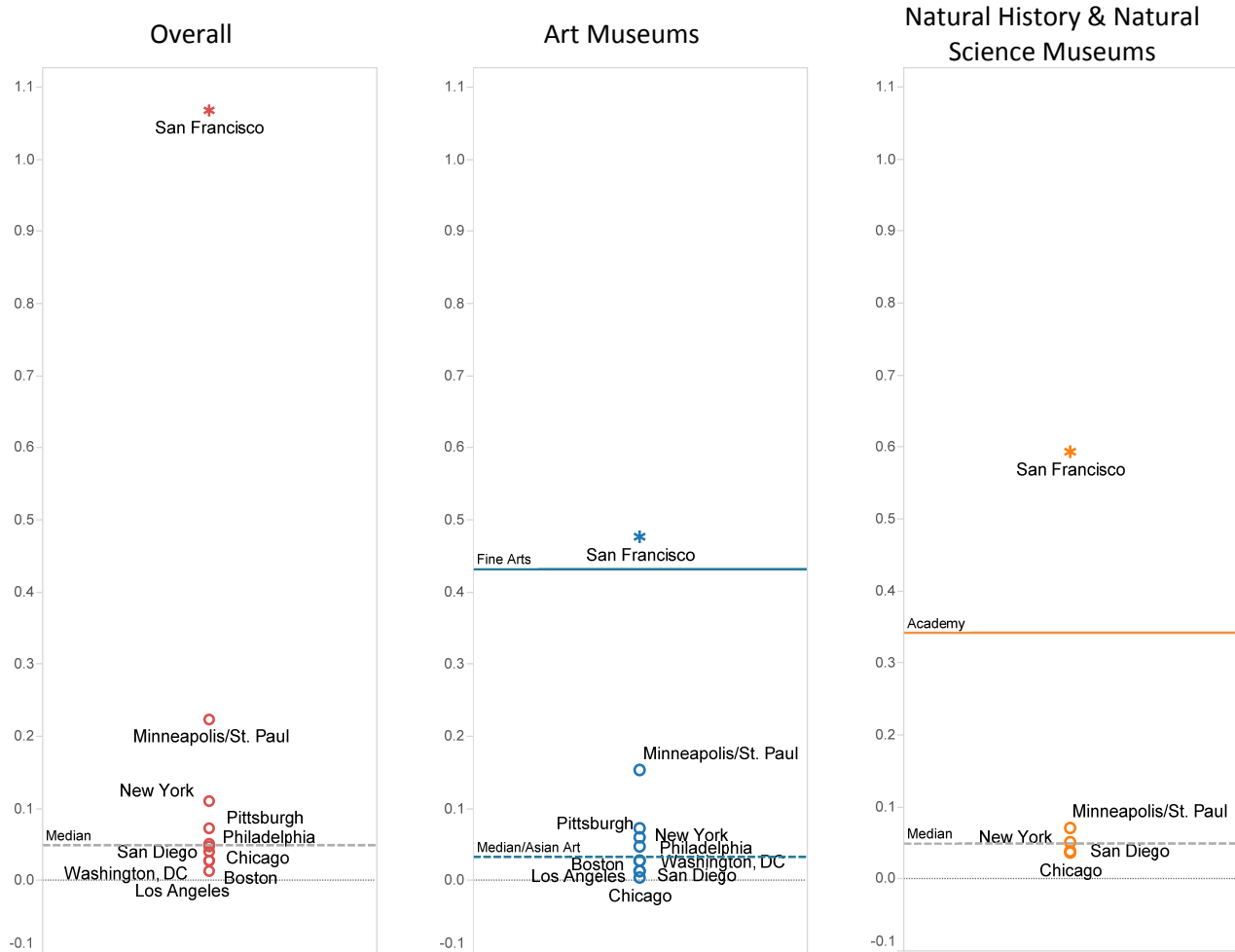


Figure 10 above suggests that despite the difference in gross scale between New York and San Francisco (New York contributes \$91 million more to 12 more comparable museums than the City), San Francisco closely rivaled New York for the number of children<sup>19</sup> that visited its comparable museums in FY 2010-11. Approximately 750,000 more children visited San Francisco’s comparable museums than the peer median.

<sup>19</sup> Children are defined as 18-years-old and younger.

Figure 11 below highlights how San Francisco’s museums compared with other jurisdictions in the number of children they were able to reach compared with overall population size. The charts show the number of children visitors per capita at each jurisdiction’s comparable museums.

**Figure 11: Total Number of On-Site Child Visitors per Capita**

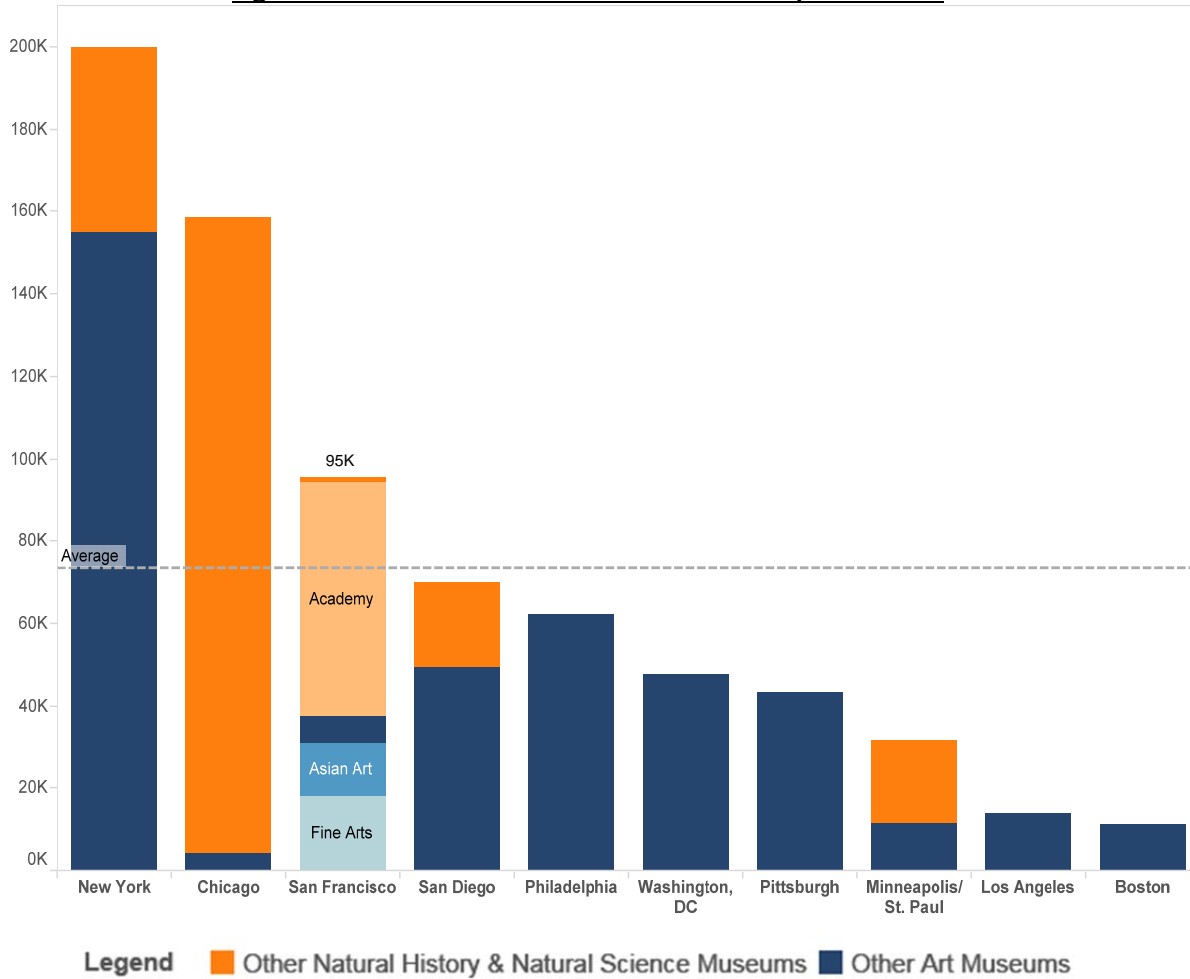


The “Overall” chart in Figure 11 demonstrates that San Francisco’s ten comparable museums attracted notably more child visitors per resident than any other peer jurisdiction. The Fine Arts Museums and both of San Francisco’s Natural History & Natural Science Museums<sup>20</sup> brought San Francisco to the number one rank for this metric (see “Art Museum” and “Natural History & Natural Science” charts above, respectively). The data used for this report does not address how many visitors were tourists and cannot be used to assess how museums compared in serving local children.

<sup>20</sup> CSA reviewed the data to understand which Natural History & Natural Science Museum is associated with San Francisco in the data along with the California Academy of Sciences and believes that The Exploratorium is the appropriate reference.

Figure 12 compares the number of people that participated in classes and workshops offered by comparable museums in each of the peer jurisdictions.

**Figure 12: Total Number of Class and Workshop Attendees**

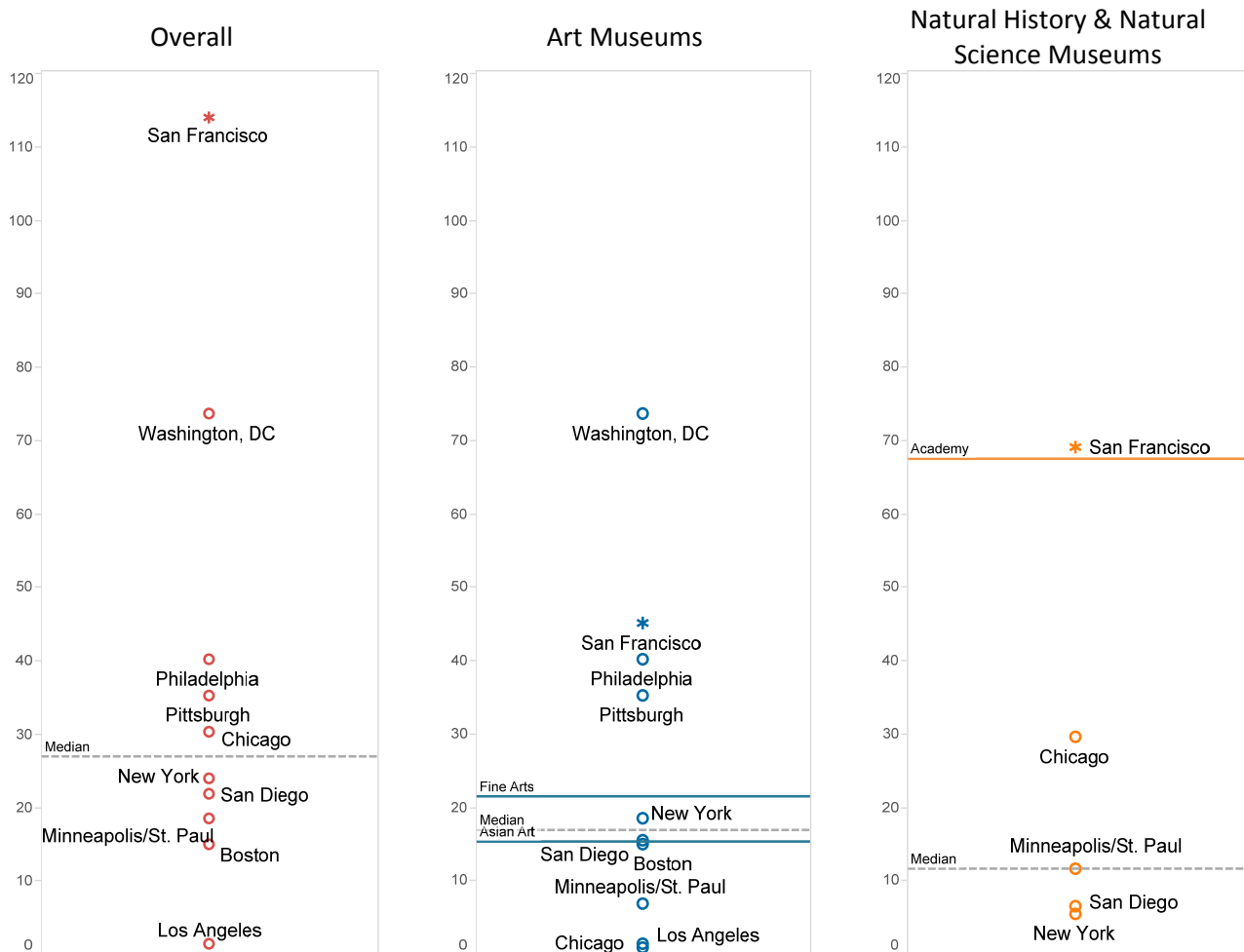


San Francisco ranks third overall for total number of people that participated in its museums’ classes and workshops in FY 2010-11, attracting 30% more participants than the peer average. The classes and workshops offered by the California Academy of Sciences were the most well-attended, and San Francisco ranks second overall for participation in Natural History & Natural Science museum classes and workshops because of the high volume and usage of the Academy’s educational programming.<sup>21</sup> San Francisco’s comparable Art Museums rank sixth overall for class and workshop attendance.

<sup>21</sup> All the people participating in the California Academy of Science’s educational programming were school-aged children.

Class/workshop attendance rates are further assessed below. Figure 13 show how class/workshop attendee totals compare by population size.

**Figure 13: Number of Class and Workshop Attendees per Thousand Residents**

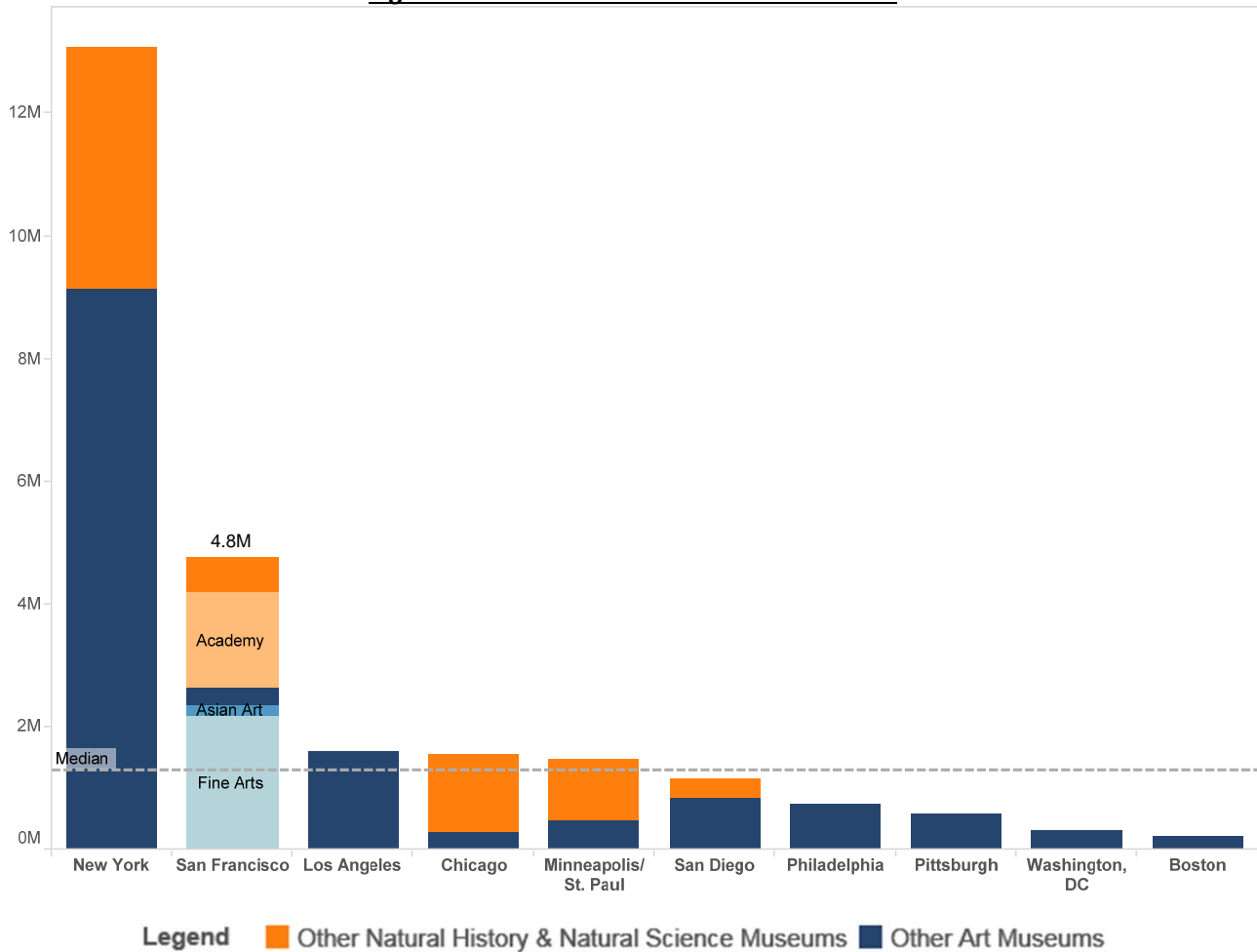


As shown in the “Overall” chart in Figure 13, San Francisco’s museums attracted notably more class/workshop attendees per thousand residents than any peer jurisdiction. The number of class/workshop attendees at the California Academy of Sciences is the largest contributor to San Francisco’s first place ranking for this metric.

**Usage**

The following graphs further assess the number of visitors that each peer jurisdiction attracted to its comparable museums.

**Figure 14: Total Number of On-Site Visitors<sup>22</sup>**



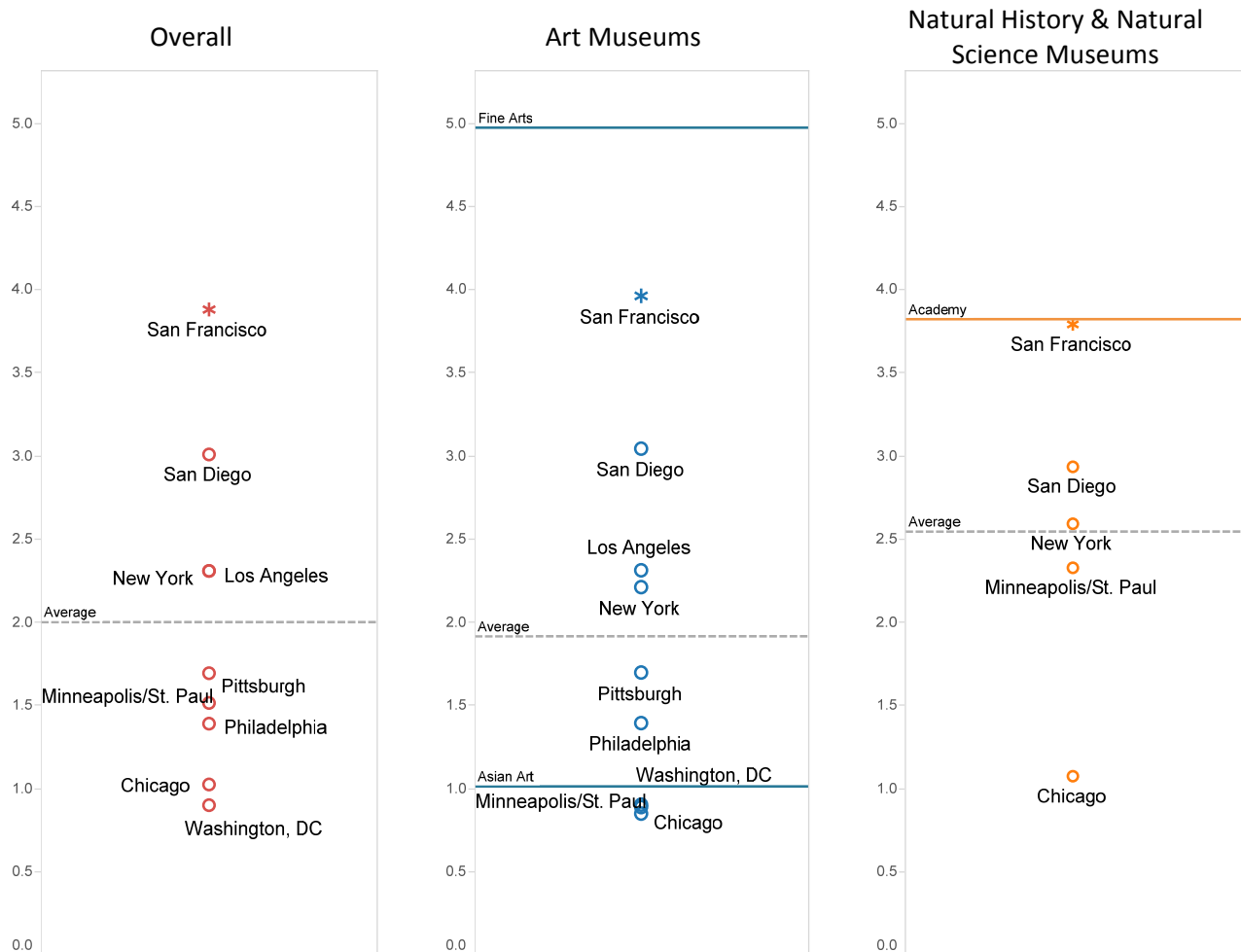
As shown above in Figure 14, the data indicates that New York was the clear outlier for gross on-site attendance in FY 2010-11. San Francisco ranked second behind New York for on-site attendance at its comparable museums, attracting 270% more visitors than the peer median<sup>23</sup> in FY 2010-11. The Asian Art Museum had much lower on-site attendance rates than either the Fine Arts Museums or the California Academy of Sciences, suggesting that it is a specialty museum that appeals to a narrower visitor market.

<sup>22</sup> CDP defines on-site attendance as “live and in-person” attendance. The data used for on-site attendance at the California Academy of Sciences and the Asian Art Museum was reported to the Citywide Performance Measurement (PM) Program run by the Controller’s Office. When reporting FY 2010-11 data to the PM Program, the Asian Art Museum defined total on-site attendance as “the number of museum visitors less school groups, events, business visitors, rental events, and free admittance to the cafe/store” and the California Academy of Sciences defined the same category as the “number of visitors to the Aquarium and Academy.”

<sup>23</sup> This report uses the median instead of the mean average in cases where there are clear outliers. In such cases, the median is a more accurate indicator of the norm among the peers (it reflects the middle value when the values associated with each peer are arranged from largest to smallest).

San Francisco attracted more on-site visitors per square foot of museum space than any other peer jurisdiction, as demonstrated in the “Overall” chart in Figure 15 below.

**Figure 15: On-Site Visitors per Museum Square Foot<sup>24</sup>**



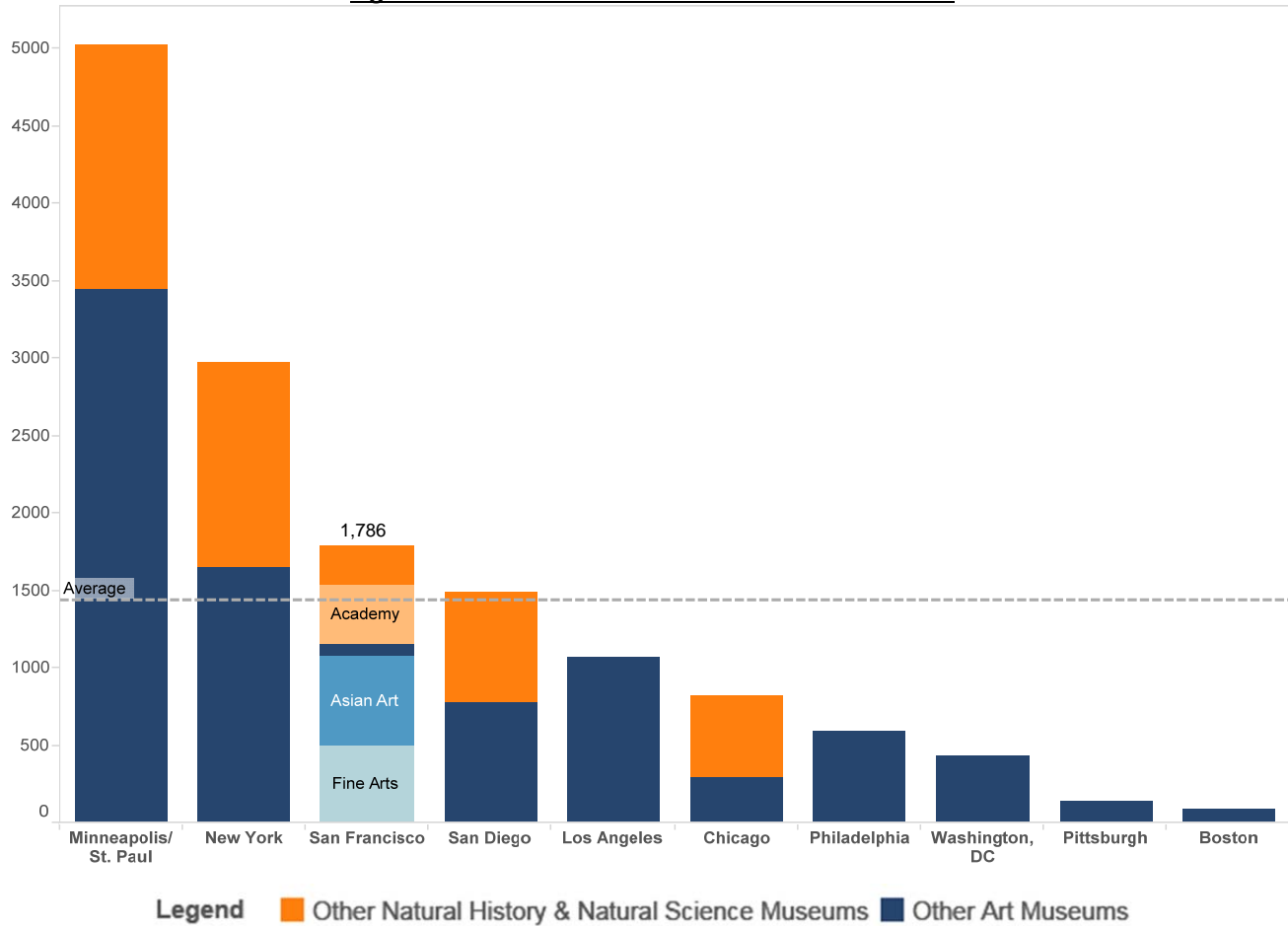
As the “Art Museum” and “Natural History & Natural Science” charts in Figure 15 demonstrate, the Fine Arts Museums and the California Academy of Sciences notably contributed to San Francisco’s overall number one ranking for this metric.

However, the numbers in Figure 14 and 15 do not reflect the usage of each jurisdiction’s museums at the local level, as these on-site attendance numbers include tourist visitors. A paper commissioned by the Getty Leadership Institute suggests using the number of volunteers that donate their time to museums as a more useful way of assessing local reputation.<sup>25</sup>

<sup>24</sup> The data does not include square footage for Boston’s comparable museum.

<sup>25</sup> Anderson, Maxwell. (2004). *Metrics of Success in Art Museums*. Center for Arts and Cultural Policy Studies, Woodrow Wilson School of Public and International Affairs, Princeton University. Retrieved from <http://www.cgu.edu/pdf/files/gli/metrics.pdf>

**Figure 16: Total Number of Part-Time Volunteers<sup>26</sup>**

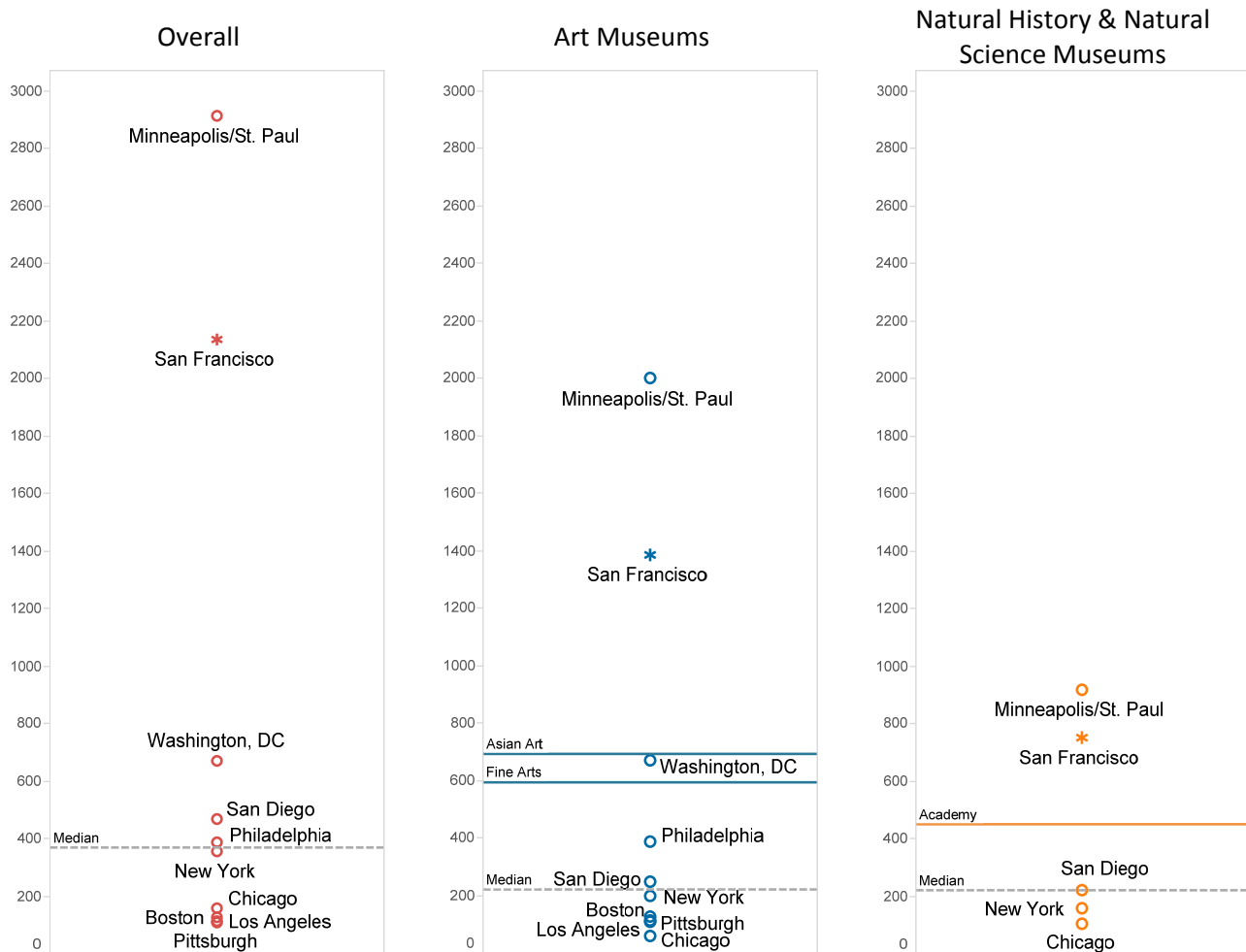


As the bar chart above demonstrates, San Francisco ranked third behind Minneapolis/St. Paul and New York for the number of part-time volunteers that served its comparable museums in FY 2010-11. Museums funded by San Francisco attracted 16% more part-time volunteers than the peer average. Also, the Asian Art Museum attracted more part-time volunteers than either the Fine Arts Museums or the California Academy of Sciences. The Asian Art Museum had 580 part-time volunteers, while the Fine Arts Museums had 497 and the California Academy of Sciences had 376. FY 2010-11 was the opening year for the California Academy of Sciences and since then they report that they have notably increased their volunteer recruitment. The Fine Arts Museums noted that they have not found volunteer numbers to be a useful indicator of local usage; while a museum may have many registered volunteers, many may be used inconsistently.

<sup>26</sup> The Cultural Data Project defines “part-time volunteers” as those that work less than seven hours for five days per week annually or the equivalent without any compensation.

Figure 17 below demonstrates that San Francisco museums attract notably more part-time volunteers per million residents than the peer median.

**Figure 17: Part-Time Volunteers per Million Residents**

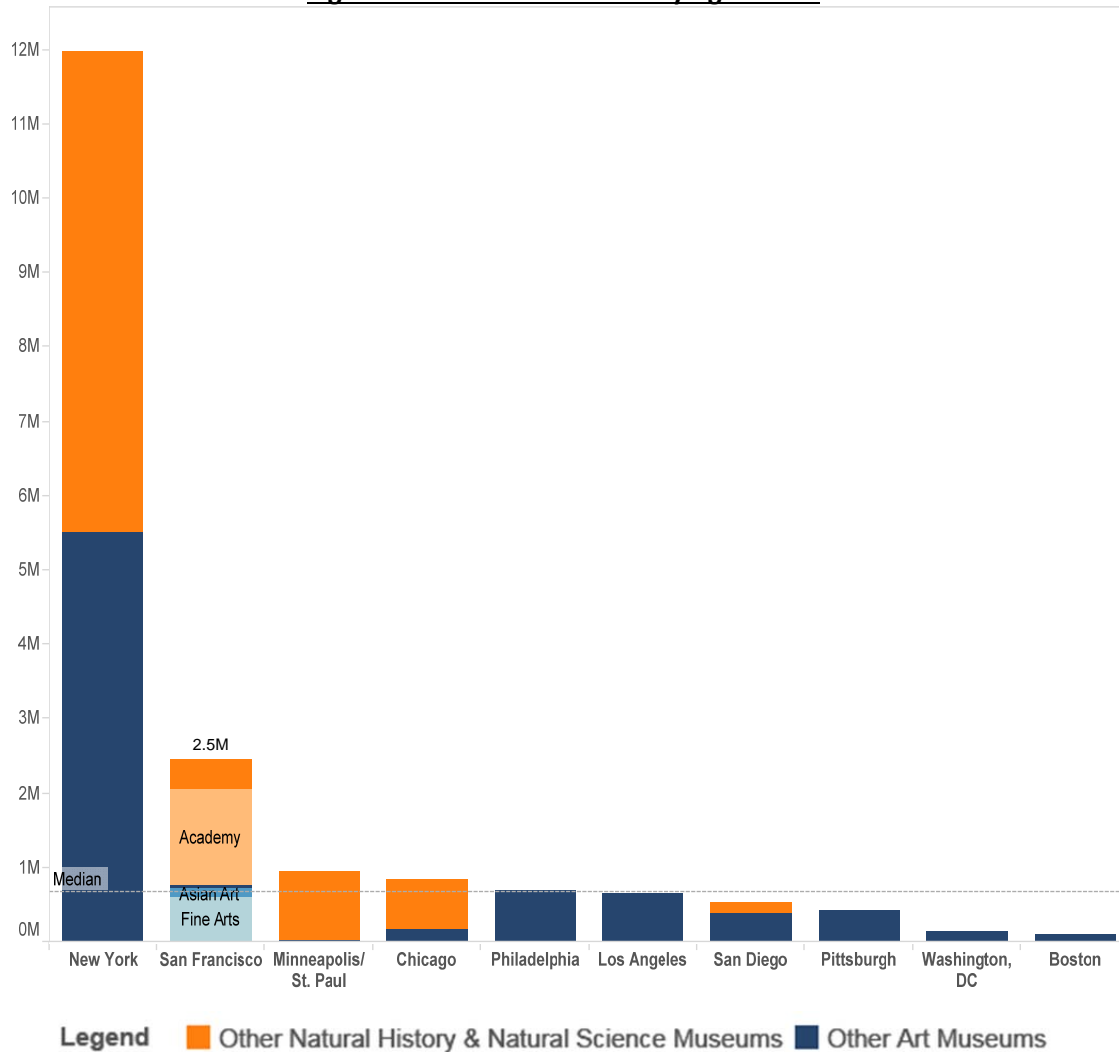


As Figure 17 demonstrates, the number of part-time volunteers per million residents at San Francisco’s eight comparable Art Museums was particularly high. Minneapolis/St. Paul consistently shows the highest rates of volunteer participation—Minneapolis/St. Paul funded five fewer comparable museums than San Francisco and its museums attracted 37% more part-time volunteers per million residents than San Francisco’s ten comparable museums, 44% more than San Francisco’s eight comparable Art Museums, and 22% more than San Francisco’s two comparable Natural History & Natural Science Museums.



Figure 18 below shows how many visitors paid to visit comparable museums in each of the peer jurisdictions in FY 2010-11. In this comparison, paying visitors means those who paid for an on-site entrance ticket. Total visitor numbers include those who hold a membership and those attending or using museum spaces or attending events that are free and open to all.

**Figure 18: Total Number of Paying Visitors**

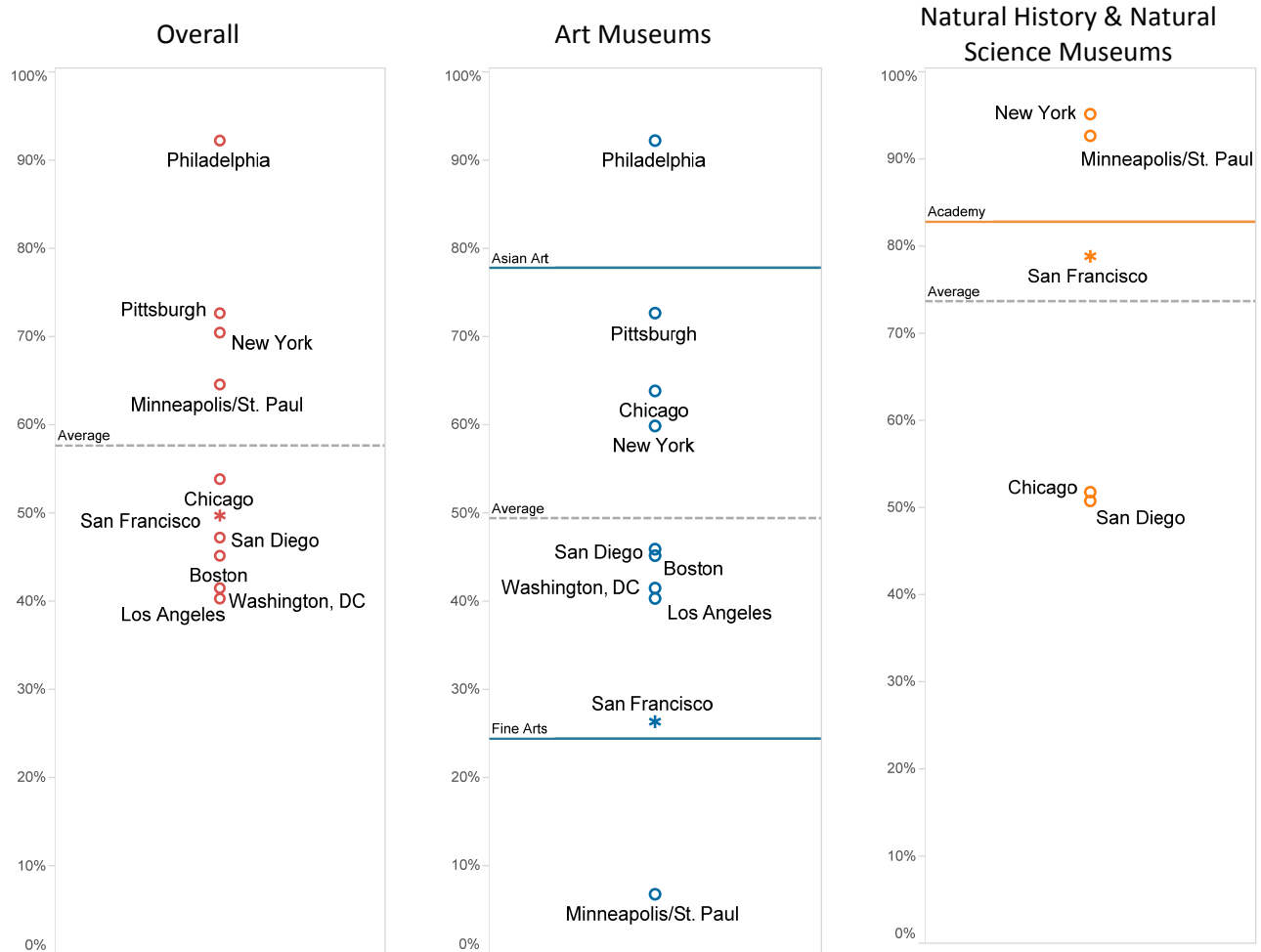


San Francisco ranked second behind New York for total paid attendance in FY 2010-11. This comparison suggests that more people were willing to pay to visit San Francisco’s museums than comparable museums in peer jurisdictions. According to a paper commissioned by the Getty Leadership Institute,<sup>27</sup> paid attendance is a useful indicator of how the public views the quality of museums. San Francisco also has a higher tourism rate than many of the peer jurisdictions. Further research is required to determine whether higher rates of tourism contribute to higher rates of paid attendance at the museums included in this analysis.

<sup>27</sup> Anderson, Maxwell. (2004). *Metrics of Success in Art Museums*. Center for Arts and Cultural Policy Studies, Woodrow Wilson School of Public and International Affairs, Princeton University. Retrieved from <http://www.cgu.edu/pdf/files/gli/metrics.pdf>

Although San Francisco ranks second among the peer jurisdictions for its aggregate number of paying visitors, Figure 19 below shows that San Francisco ranks notably lower when these numbers are compared against total on-site visitor counts.

**Figure 19: Paying Visitors as a % of Total Visitors**



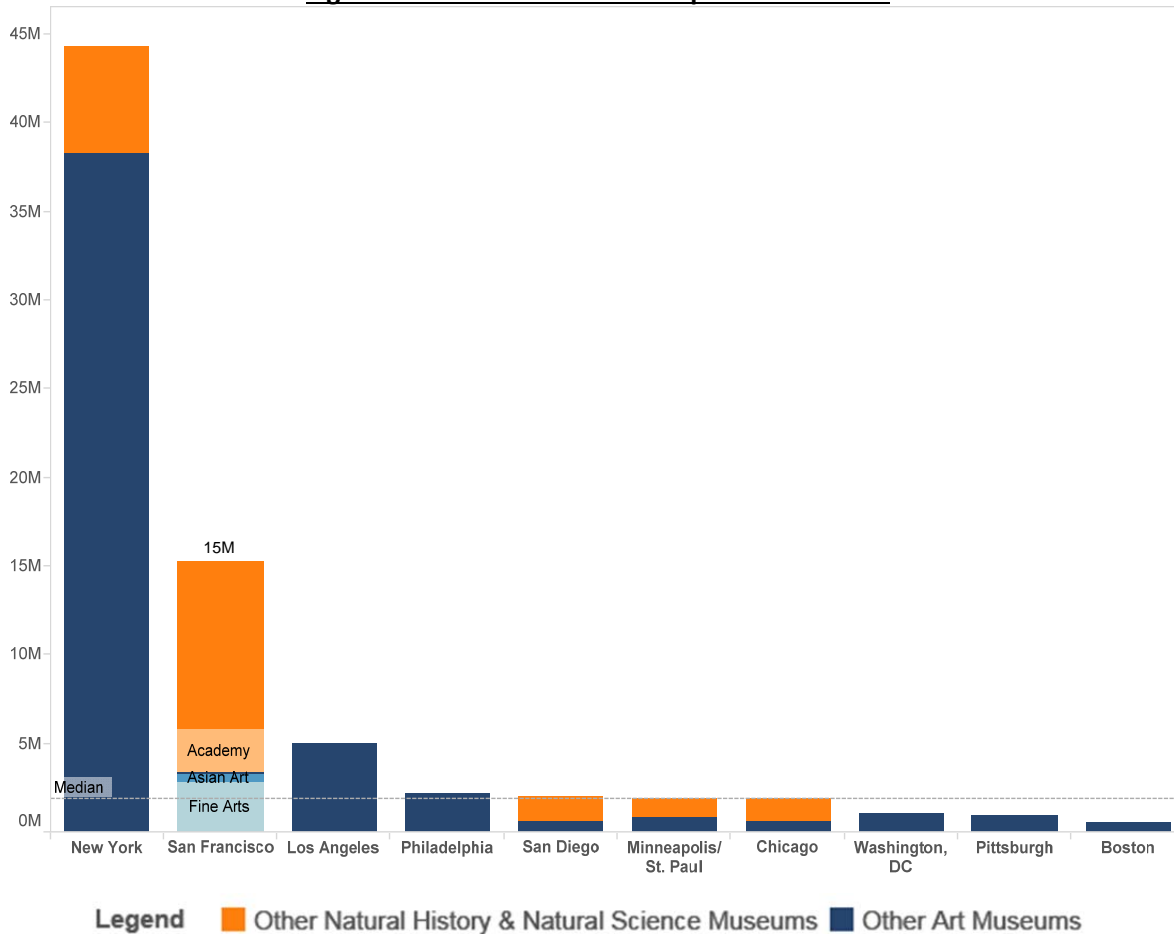
As indicated in the “Art Museums” chart in Figure 19 above, the proportion of visitors to San Francisco’s eight comparable Art Museums that paid for entrance was 23 percentage points below the peer average. As previously discussed, the de Young includes a free space for on-site visitors that do not wish to pay to view the museums’ exhibitions. These visitors include those that do not pay to enjoy the de Young’s events on Friday nights. The Fine Arts Museums of San Francisco also had a membership base of over 120,000 which allows free admission to the de Young and Legion of Honor. Nonetheless, the proportion of visitors paying to visit the Asian Art Museum was notably above average.

The proportion of visitors paying to visit Minneapolis/St. Paul’s Art Museums, however, was notably below average. The reason that Minneapolis/St. Paul is an outlier in this case is unclear. One of the two Art Museums from Minneapolis/St. Paul did not report any paying on-site visitors in FY 2010-11. This may be because this museum offers free admission to the public. Or, it may have simply neglected to report the number of paying visitors it served in FY 2010-11.

The percentage of visitors paying to enjoy San Francisco’s two Natural History & Natural Science Museums was also above average, particularly at the California Academy of Sciences (see “Natural History & Natural Science” chart above).

Another indicator that the paper commissioned by the Getty Leadership Institute<sup>28</sup> suggests for assessing the quality of the museum experience is by comparing the number of unique visitors to museum websites.

**Figure 20: Total Number of Unique Web Visitors**

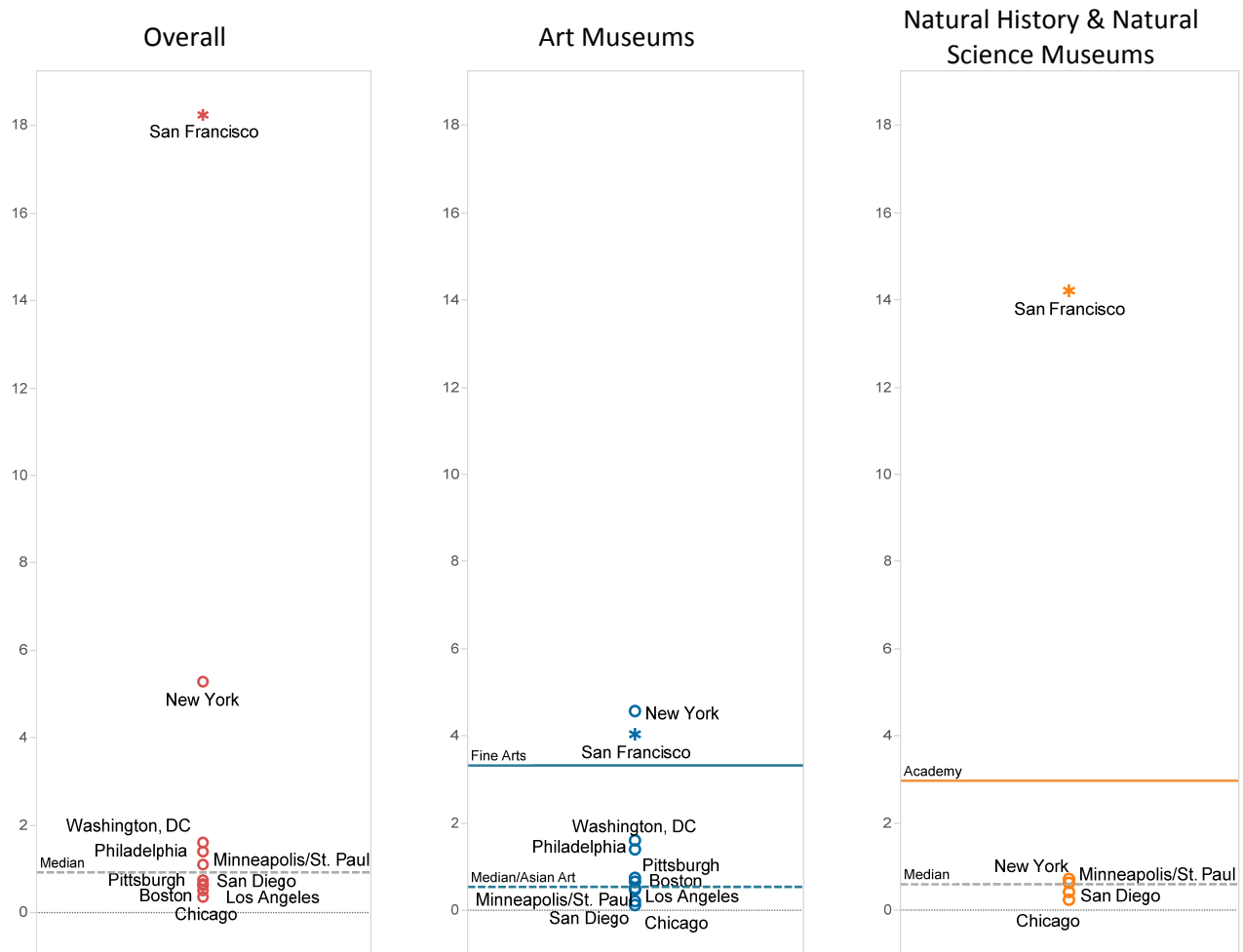


As Figure 20 above suggests, New York remains an outlier for the number of unique visitors to its comparable museums’ websites in FY 2010-11. San Francisco ranks second for the number of unique web visitors to its comparable museums in the same year – 13 million more than the peer median. Moreover, San Francisco ranked first for the number of visitors to its Natural History & Natural Science Museums’ websites and third behind New York and Los Angeles for the number of visitors to its Art Museums’ websites.

<sup>28</sup> Anderson, Maxwell. (2004). *Metrics of Success in Art Museums*. Center for Arts and Cultural Policy Studies, Woodrow Wilson School of Public and International Affairs, Princeton University. Retrieved from <http://www.cgu.edu/pdf/files/gli/metrics.pdf>

Finally, as the “Overall” chart in Figure 21 below demonstrates, San Francisco’s ten museums ranked first overall for total number of unique web visitors per capita.

**Figure 21: Total Number of Unique Web Visitors per Capita**



The “Overall” chart in Figure 21 demonstrates that, although San Francisco’s population size is the third smallest among the peer jurisdictions, its comparable museums attract the most unique web visitors per capita. Moreover, San Francisco’s anonymous Natural History & Natural Science Museum (believed to refer to The Exploratorium) contributed notably to this outlier first place ranking (see “Natural History & Natural Science Museums” chart).

**Areas for Future Research**

The measures included in this report provide a broad and high-level overview of museum financial and operational performance. Further, this report represents a snapshot in time and it should be regarded only as a starting point for further evaluation. Based on the foregoing analysis, potential opportunities for future research and evaluation may include the following:

- Investigate how many visitors to the museums reside within the jurisdictions to further assess the local popularity of comparable museums;
- Investigate the percentage of operating expenses paid from endowment proceeds to assess how much boards are paying attention to museum long-term health;
- Investigate how many local visitors to San Francisco's museums were children to assess how well these museums are fulfilling their educational mandates at the local level;
- Compare ticket prices and affordability for adults, children, seniors, and students with attendance rates for these four groups;
- Investigate the percentage of total building size devoted to exhibitions to assess how effectively museum facilities contribute to their core missions;
- Use more recent data to assess how San Francisco's museums currently perform in comparison with their peers;
- Investigate how San Francisco's museums performed over time in relation to comparable museums from peer jurisdictions.

## Appendix A: Data Sources

The data used for this report came from the following sources:

### ***Cultural Data Project***

The Cultural Data Project (CDP) offers a unique system that enables arts and cultural organizations to enter financial, programmatic and operational data into a standardized online form. Organizations can then use the CDP to produce a variety of reports designed to help increase management capacity, identify strengths and challenges and inform decision-making. They can also generate reports to be included as part of the application processes to participating grantmakers.

The CDP was first launched in Pennsylvania in 2004 through the collaboration of a group of public and private grantmakers and arts advocates who formed the CDP's Governing Group. Based on its success in Pennsylvania, the CDP began a process of national expansion, and now serves more than 14,000 arts and cultural organizations in 12 states and the District of Columbia. In each participating state, the CDP is the result of a collaborative partnership of public and private funders and advocacy agencies.

The CDP is the emerging national standard for data collection in the arts and cultural sector. The CDP offers a turnkey solution to each state, with all technology and services provided centrally through the CDP's Philadelphia headquarters. CDP staff support all current and future participants, including organizations, grantmakers, and researchers/advocates.

The CDP was operated by The Pew Charitable Trusts until 2013, and is now an independent 501(c)(3) nonprofit with a national board of directors and governance structure.

### ***Citywide Performance Measurement Program***

The Citywide Performance Measurement (PM) Program – managed by the Controller's Office City Performance Unit – strives to increase the use of performance measurement in order to improve the efficiency and effectiveness of City government. The PM Program collects, validates, and reports on performance data from all 48 City departments in order to increase transparency, create dialogue, and build the public's confidence regarding the City's management of public business. The program team also provides technical assistance to departments to improve the quality, breadth, and relevance of their performance measures. The Controller's Office began collecting performance data in 2000 and uses this information to assess the efficiency and effectiveness of City services – as mandated by voters in Proposition C (2003).

### ***Individual Museums***

FY 2010-11 data that had not been reported to the CDP or PM Program was requested separately from the San Francisco museums highlighted in this report. Data requests were made using CDP definitions for each category.

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**CONTROLLER'S OFFICE  
CITY SERVICES AUDITOR**

The City Services Auditor was created within the Controller's Office through an amendment to the City Charter that was approved by voters in November 2003. Under Appendix F to the City Charter, the City Services Auditor has broad authority for:

- Reporting on the level and effectiveness of San Francisco's public services and benchmarking the city to other public agencies and jurisdictions.
- Conducting financial and performance audits of city departments, contractors, and functions to assess efficiency and effectiveness of processes and services.
- Operating a whistleblower hotline and website and investigating reports of waste, fraud, and abuse of city resources.
- Ensuring the financial integrity and improving the overall performance and efficiency of city government.

**Project Team:** Peg Stevenson, Director  
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