

COVID-19 and the Arts

Cultural Alliance Member Survey Results – as of 4/1/2020

The Greater Philadelphia Cultural Alliance has surveyed its member organizations, receiving 120 responses to date from a wide range of arts and culture nonprofits - from small, community-based youth education, theater to major performing arts organizations and major museums.

WHO RESPONDED

By Discipline (many organizations have more than one discipline)

- 34% Education & Instruction
- 29% Music
- 21% Theatre
- 17% Presenting Organization / Performance venue
- 17% Community Art Center
- 16% Artistic Developers / Artist Residencies
- 13% Historic / Cultural Presentation
- 10% Media Arts
- 7% Museums
- 6% Folk & Traditional Arts
- Less than 5%: Libraries, Literature, Service organizations
- No Science, Nature or Garden organizations responded

Annual budget sizes varied from more than \$10 million to less than \$50,000 with a balanced representation of the sector.

THE IMPACT OF COVID-19 ON ARTS AND CULTURE NONPROFITS

Programming

- 92% canceled performances, productions or events
- 63% cannot deliver community programs or arts services
- 60% have closed (museum, community art center, theater, museum, etc.)
- 47% cannot continue educational or teaching artist programs
- 47% cannot hold rehearsals
- 47% cannot prepare for future exhibitions or programs
- 4% cannot care for our collections or living collections
- Also, performing ensembles have had to cancel national and international tours

Fiscal Challenges

Revenue Losses

- 75% have lost significant earned revenue (refunded tickets, loss of admission/ticket sales, concession/gift shop sales, rentals, etc.)

- 51% canceled fundraising events
- 42% cannot conduct contributed revenue campaigns (annual fund, major gift solicitations, sponsorships, etc.)
- 25% have lost investment/endowment income
- 7% have had to return grants/funding

Increased Costs

- 26% are experiencing unanticipated costs – to enable staff to work from home, provide virtual services for the public or our constituents
- 14% cannot pay current/past bills or future rent of space

Workforce Reductions

- 27% have frozen hiring
- 36% have laid off/discontinued contractors
- 27% have frozen new hiring
- 19% have laid off or furloughed front-line staff that interact with the public
- 14% have reduced core staff because they cannot make payroll

The figures above are as of April 1. Workforce reductions will rapidly escalate as organizations implement their survival plans. The CARE Act provisions for forgivable loans from the federal government will help many organizations, but how this will work is uncertain at this point.

HOW FUNDERS ARE PROVIDING SUPPORT

- 62% of organizations have been given more flexibility – extended deadlines for completion, ability to repurpose project grants for operating costs, etc.
- 30% of organizations have received new grants or donations specifically for this challenging time
- 50% of organizations have been contacted by or reached out to funders but have not been offered specific financial relief as yet
- 8% of organizations have had funders pay grants earlier than scheduled

HOW ARTS AND CULTURE NONPROFITS CONTINUE TO SERVE THE PUBLIC

In this crisis cultural organizations have made public service a priority. Those organizations that already had streaming or virtual capability have dramatically increased content and frequency. Teaching organizations have pivoted to provide lessons online. Social media is being widely used to keep in contact with constituents and to support efforts to provide needed information to the public.

Virtual Services and Experiences

- 59% sharing positive content to foster community and good mental health
- 58% social media-specific content or campaigns
- 36% pre-recorded videos of performances
- 30% online chats or webinars for constituents

- 27% lessons or classes taught by artists using Facebook, Zoom or other platforms
- 21% Facebook groups to help people connect
- 18% live videos of performances
- 17% providing information specific to COVID-19, such as health tips or science-related 10% pre-recorded virtual tours of exhibitions or collections
- content
- 10% fundraising campaigns intended to support individual artists or teachers
- 8% sharing information from other experts – such as history, literature, horticulture, science experts
- 8% online sales of books, recordings, curriculum, gift cards, or other resources
- 7% opportunities to purchase visual arts or to download visual arts
- 7% Live virtual tours of exhibitions or collections

In addition to the actions by organizations above, hundreds of individual artists have kept up the spirits of the public with original hand-washing songs, COVID-19 parodies, artwork for memes on social media and other ways to create community, make people laugh and reinforce that we are all in this together.

Collaborations to provide service and to reach out to particular constituencies or audiences

Arts and culture nonprofits are working with many partners to reach out to people who are isolated, to parents and their children, and to many vulnerable communities

- 55% with arts organizations
- 33% with schools or educational organizations
- 17% with human service organizations
- 17% with neighborhood organizations
- 17% have contacted or been contacted by elected Officials (Federal, State or Local):
- 12% with local businesses
- 10% with government agencies
- Other