Performing Arts Coronavirus Impact & Response Benchmarking
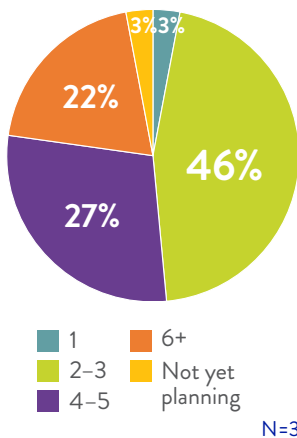
MAY 13, 2020

The Advisory Board for the Arts surveyed leaders at arts organizations — including operas, symphonies, festivals, theaters, venues, and museums — about the impacts of coronavirus on their institutions. This online survey was fielded **May 6–May 12, 2020.** This is the seventh survey of a weekly series.

REOPENING SCENARIOS

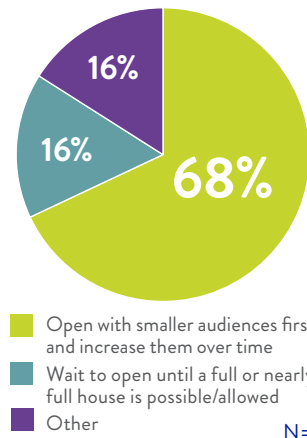### Planning Amidst Uncertainty

Distinct Scenarios Orgs are Planning For

- 1
- 2–3
- 4–5
- 6+
- Not yet planning

N=37

Counting on Additional Waves

Orgs Planning for Possibility of Future Closures

70%

N=37

Most Plan to Open Small

Most Likely Reopening Scenario

- Open with smaller audiences first and increase them over time
- Wait to open until a full or nearly full house is possible/allowed
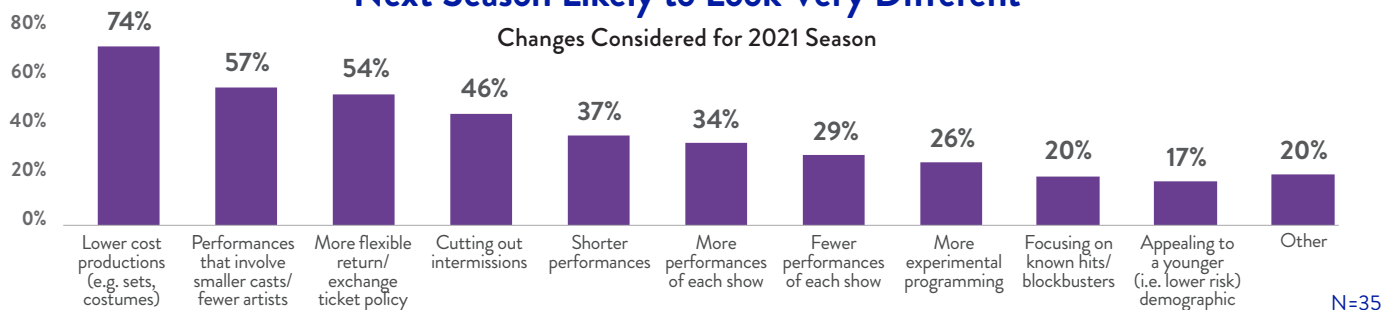- Other

N=37

Significantly Reduced Seating

Venue Capacity with Social Distancing

31%

N=36
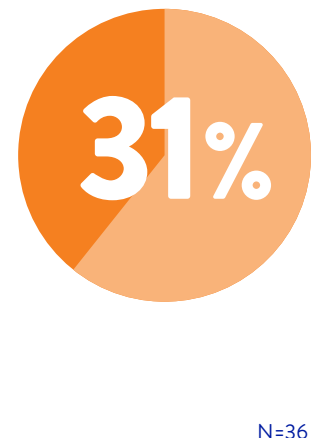
Next Season Likely to Look Very Different

Changes Considered for 2021 Season

Lower cost productions (e.g. sets, costumes)	74%
Performances that involve smaller casts/ fewer artists	57%
More flexible return/ exchange ticket policy	54%
Cutting out intermissions	46%
Shorter performances	37%
More performances of each show	34%
Fewer performances of each show	29%
More experimental programming	26%
Focusing on known hits/ blockbusters	20%
Appealing to a younger (i.e. lower risk) demographic	17%
Other	20%

N=35

Donor and Mission Considerations Most Pressing

Mean Importance of Reopening Considerations
(Scale: 1 = Not at All Important; 5= Extremely Important)
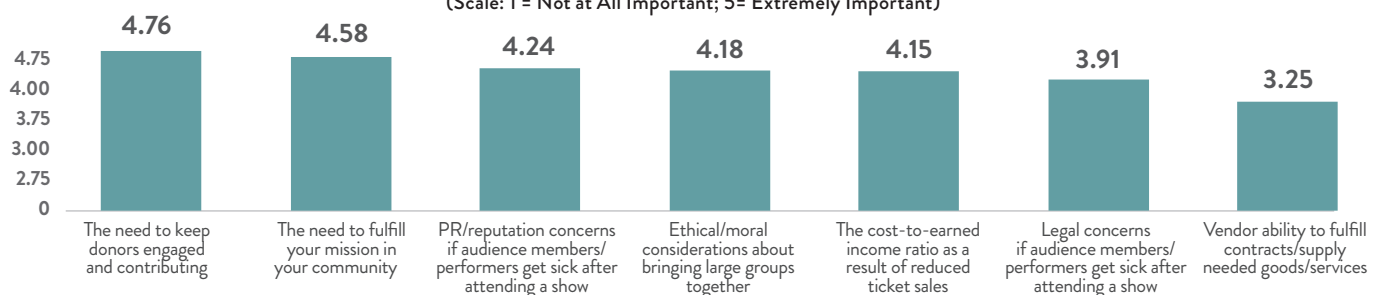
The need to keep donors engaged and contributing	4.76
The need to fulfill your mission in your community	4.58
PR/reputation concerns if audience members/ performers get sick after attending a show	4.24
Ethical/moral considerations about bringing large groups together	4.18
The cost-to-earned income ratio as a result of reduced ticket sales	4.15
Legal concerns if audience members/ performers get sick after attending a show	3.91
Vendor ability to fulfill contracts/supply needed goods/services	3.25

N=33

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SILVER LININGS

Lasting Positive Changes As a Result of Coronavirus

"Clarity of mission and core values"

"New opportunities for connecting via digital which we had been slow to adopt previously"

"More local collaboration [and] an opportunity to experiment with presenting more local talent"

"All-staff communication has improved, trust has increased, and the team is stronger"

"Creating more nimble, informed, and flexible employees"

"Possible changes to large infrastructure costs associated with running a company of our scale"

"Better cleaning and sanitization protocols"

"Will force us to continue to build a cash reserve for the future"

"Moving into the digital world expands our audiences beyond people who were able to physically come to our theaters before"

"Creating a new partnership with a significant promoter to move forward with a new conceptualization of safe, live performances [which] would not have materialized in a "business as usual" climate"

"Stronger relationships between Marketing, Development, and artists/musicians"

"Created a filming and streaming distribution process for our shows that we've never had before, and will continue to reach new audiences using an online platform (if allowed by unions)"

"Unity between staff, Board, orchestra, and patrons"

"Renewed relevance of cultural experiences"

"Longer planning cycles; more sustainable budget size; more flexible programming model"

"The adaptive programming we are developing to sustain the organization can create new partnerships and bring us to a broader audience"

"Better understanding of what we can do remotely—both programatically and work force"