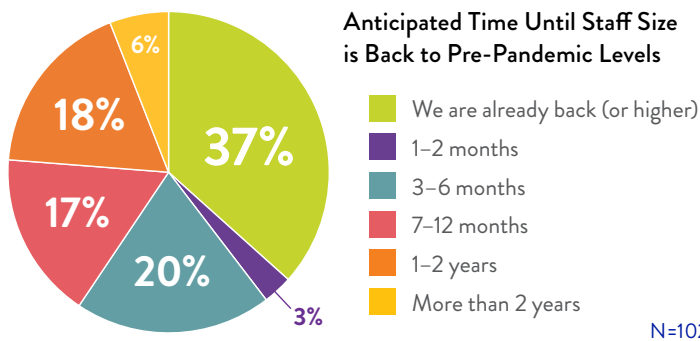


APRIL 27, 2021

The Advisory Board for the Arts regularly surveys leaders at arts organizations — including operas, ballets, symphonies, festivals, theaters, venues, schools, advocacy organizations, and museums — about issues relevant to the arts world. This online survey was fielded **April 19–23, 2021**. This is the twenty-seventh survey of the series.

COVID SAFETY MEASURES

Most Expect Pre-Pandemic Staff Size Still Months — If Not Years — Away



Leader Insights on Staffing Levels

We are downsizing staff for the long term via job consolidation, task elimination, contracting, and other operational efficiencies.

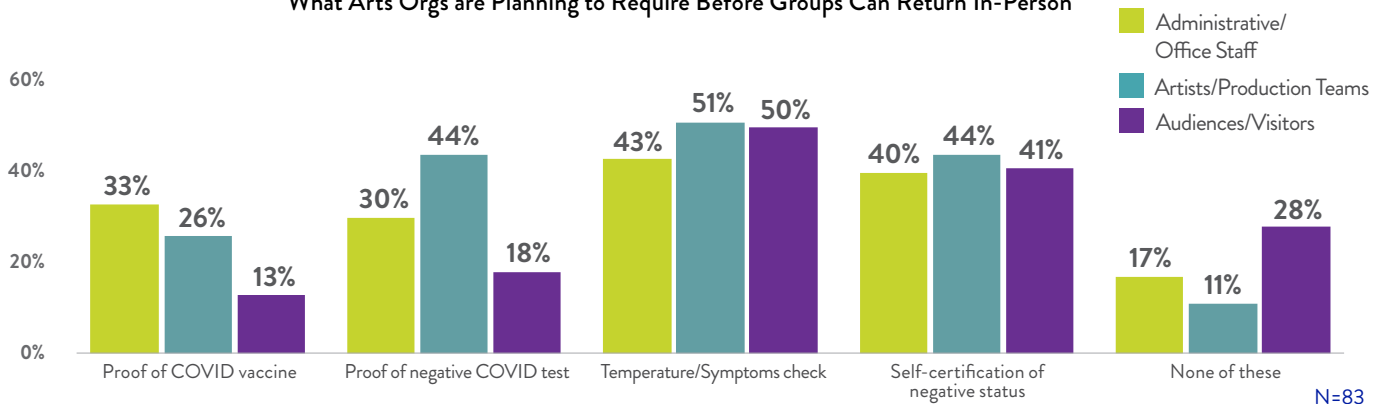
We have retained some departments at 100% headcount, but only 80% hours.

Very likely we'll be restructuring. It's not because of the pandemic, but the pandemic gave us time to reconsider how best to structure the company.

The staff is constantly fluctuating, and new roles being created while others aren't necessarily filled when empty — there is perpetual experimentation in staffing.

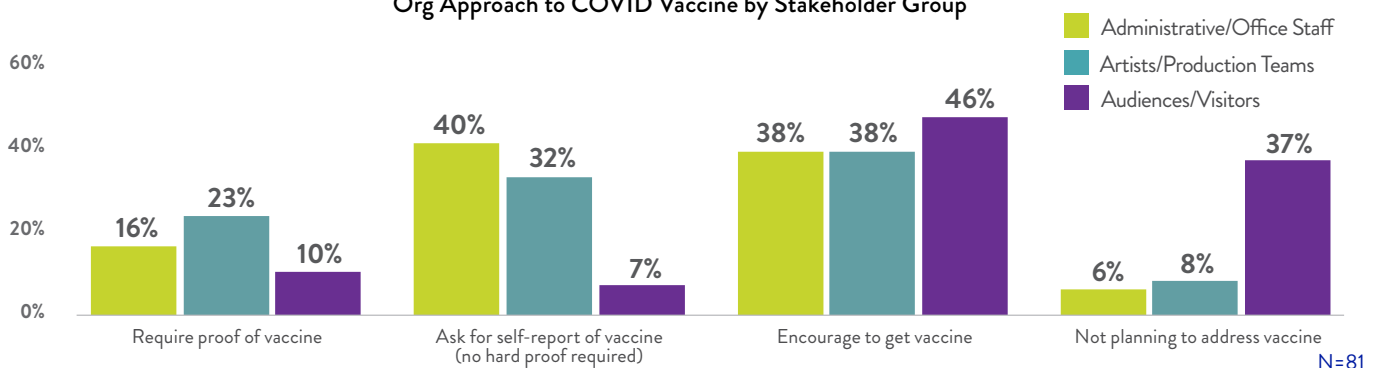
Orgs Planning Varied Requirements for COVID Safety

What Arts Orgs are Planning to Require Before Groups Can Return In-Person



Most Orgs Will Not Require Proof of Vaccine for Return

Org Approach to COVID Vaccine by Stakeholder Group



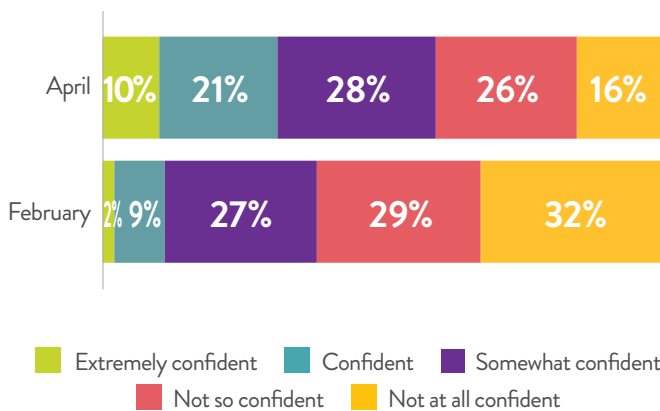
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GETTING AUDIENCES BACK

Confidence in 2021 Gatherings is Growing

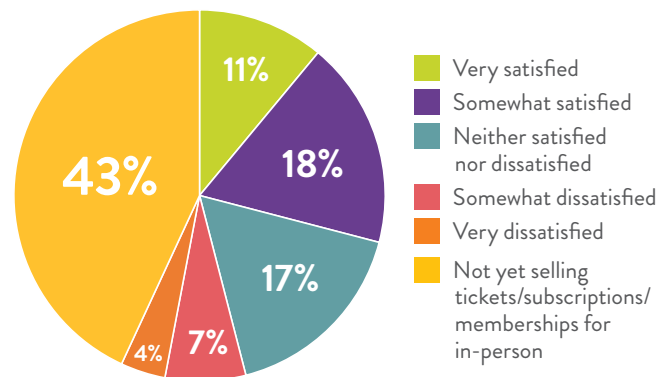
Confidence that Org Will Be Able to Welcome Pre-Pandemic Capacity Groups Indoors in 2021



February N=153; April N=82

Mixed Results for Future Ticket Sales; Many Not Yet Selling At All

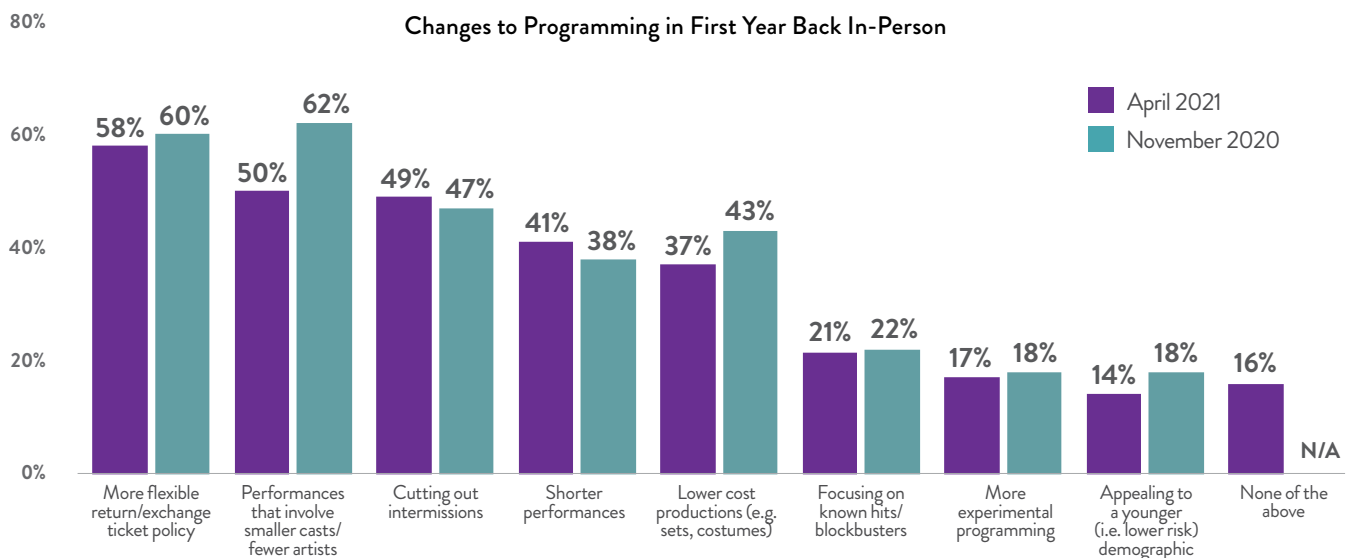
Satisfaction with Current Sales of Tickets, Subscriptions, and Memberships for Future In-Person Experiences



N=82

Return To Live Will Focus Less Emphasis on Smaller Casts or Lower Cost Than Once Thought

Changes to Programming in First Year Back In-Person



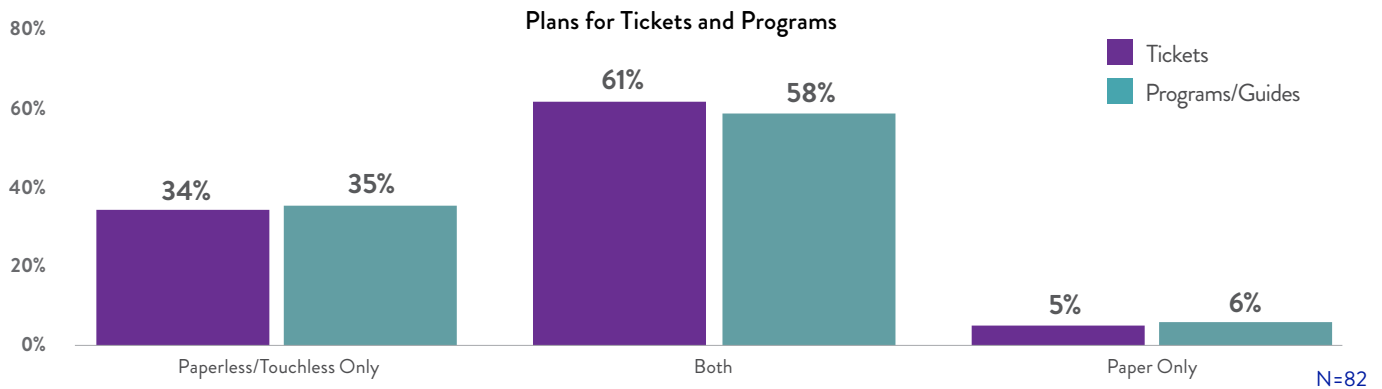
November 2020 N=60; April 2021 N=76 (Performing Arts Orgs Only)

APRIL 27, 2021

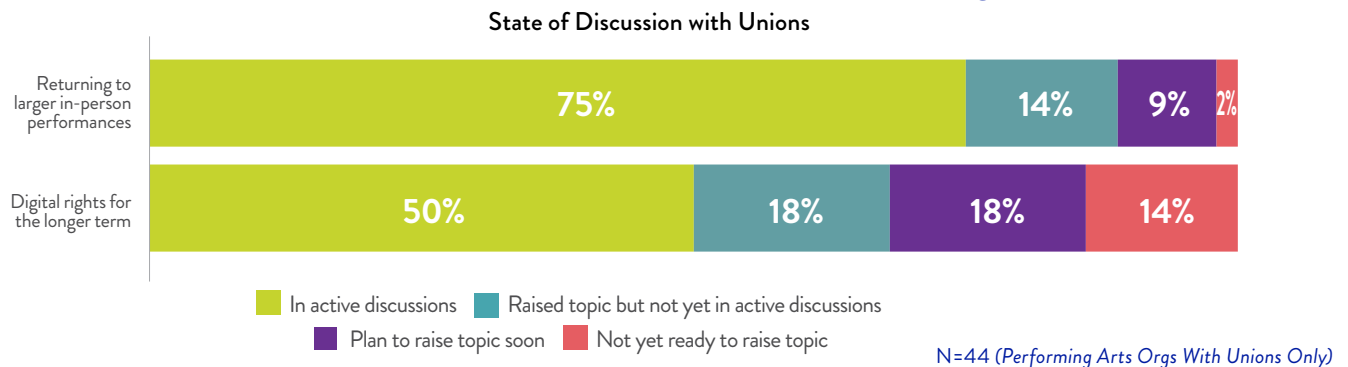
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PAPER, UNIONS, AND CRISIS PREP

Most Planning a Hybrid Approach to Tickets and Programs

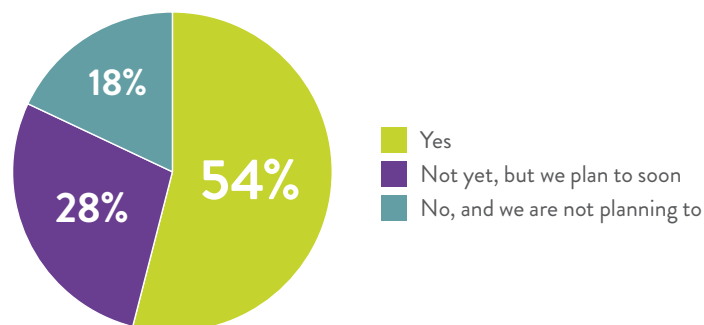


Active Discussions with Unions Ongoing; More Focused on Return to In-Person Than Digital



Half Have Updated Crisis Management Plan Since Pandemic Hit

Has Org Updated Crisis Management Plans and Procedures Due to COVID-19



N=82