

LA's Performing Arts and Reopening Survey

Overview of Survey Findings

February, 2022

**STAR
INSIGHTS**



Survey Goals

Design, distribute, and analyze a follow up survey to last Spring 2021's "LA's Performing Arts and Reopening" survey to better understand:

- A) The current needs of LA's performing arts organizations
- B) How the needs of LA's performing arts organizations may have changed over time

Survey 2.0 Activity

Target Respondents

- Contact roster of performing arts leaders who completed the Spring 2021 “Reopening LA’s Performing Arts Organizations” survey (n=214)

Response Window

- January 12th, 2022 thru January 21st, 2022

Response Overview

- 203 successful survey deliveries
- Total surveys completed: 76

Final Sample Make-Up

- Total baseline responses for analysis : 69
 - To place focus on *performing arts organizations*, the trimmed sample size omits:
 - Organizational duplicates
 - Individual performing arts professionals
 - Organizational responses from individuals in non-leadership roles

Survey Demographics (full sample)

Organizational Roles

Majority of respondents are performing arts executives and leaders, including executive directors, artistic directors, founders, and managing directors

Performance Discipline

Respondents identified their organization's discipline, at least in part, as the following::

- Theatre - 42%
- Music (Choral/Opera and Instrumental combined) - 29%
- Arts Education - 22%
- Dance - 20%
- Presenting - 16%
- Multidisciplinary - 12%

BIPOC-Led & Culturally Specific Institutions

Majority of responding orgs do NOT identify as BIPOC of culturally specific institutions

- No - 67%
- Yes - 33%

Annual Operating Budgets (AOB's)

- \$499,999 or less - 54%
- \$500,000 - \$999,999 - 23%
- \$1 million and higher - 23%

Survey Findings - Annual Operating Budgets

BIPOC Performing Arts Organizations

AOB Range (n=23)	Percentage of Respondents
\$499,999 or less	70%
\$500,000 - \$999,999	17%
\$1 million - \$2,999,999	9%
\$10 million or more	4%

Non-BIPOC Performing Arts Organizations

AOB Range (n=46)	Percentage of Respondents
\$499,999 or less	46%
\$500,000 - \$999,999	26%
\$10 million or more	11%
\$1 million - \$2,999,999	9%
\$5 million - \$9,999,999	7%
\$3 million - \$4,999,999	2%

Survey Findings - Reopening Status

75% of all responding performing arts organizations indicate they've resumed in-person or live event offerings

Reopening Status for Reopened Orgs (n=52)	% of respondents who included adjacent descriptor in their survey response
"My organization has reopened with a pre-pandemic business model but at reduced capacity (i.e. fewer staff, shortened performance season, etc.)"	60%
"My organization has reopened and shutdown multiple times due to pandemic related impacts."	35%
"My organization has reopened under a new business model."	25%

Reopening Status for Unopened Orgs (n=16)	% of respondents who included adjacent descriptor in their survey response
"My organization is still working towards an official reopening."	75%
"My organization is unable to reopen due to financial or other constraints."	31%
"My organization has reopened and shutdown multiple times due to pandemic related impacts."	25%

Survey Findings - Reopening During the Pandemic

Organizational Capacity

- Overall, organizations who have resumed in-person offerings report a reduction of nearly 50% in their pre-pandemic operating capacity

Audience Attendance

- On average, reopened organizations reported that audience attendance is roughly 50% of pre-pandemic levels

Ticket Revenue

- A subset of reopened performing arts orgs (n=35) report earning slightly more than 1/3 of their pre-pandemic ticket revenue

Survey Findings - Reopening During the Pandemic

Adjusting to Public Health Guidelines

- Organizations agree that they have the necessary resources to keep their staff and artists safe
- Organizations agree that they've successfully implemented public health measures to ensure confidence in their in-person audiences

Audience Feedback Re: Public Health Guidelines

- Organizations who've received feedback have generally received positive feedback from their audiences
- Instances of negative feedback focus around audience hesitancy and various forms of external resistance to public health protocols

Withstand an additional pandemic shutdown?

- Majority of reopened respondents neither agree nor disagree that they'd be able to weather an additional pandemic shut-down

Survey Findings - Relief Funding & Allocation

Received Relief

- 88% of all responding organizations report receipt of pandemic relief funding
- Data suggests that respondents predominantly received relief funds from:

PPP	LACDAC	SVOG
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How are respondents using relief funding?

Funding Allocation Category - All Orgs (n=62)	% of respondents who included adjacent category in their response
Operating and reopening efforts	87%
Covering loss incurred due to pandemic-related shutdowns	74%
Investing in my organization's needs (i.e. building improvements or related)	40%
Establishing a reserve fund for long-term services	19%

Survey Findings - Current Challenges & Needs

The Challenges

Financial viability

Audience attrition

AB5 restrictions

Anticipated Needs

Financial support

COVID-compliance guidance

Access to performance or
rehearsal space

Survey Impressions (2021-2022)

LA's Performing Arts & Reopening Survey

April, 2021

"Very small performing arts companies dealing with reopening and AB5 are under existential threat."

"Between COVID and AB5, it feels hopeless to continue."

"...a great deal will depend on what spaces are available and if we can afford them."

"We will open. We have a mandate to provide services to our community and audiences."

"We may have to take on a community theatre construct with very few employees, no independent contractors. Artistic and technical personnel will all have to be working on a volunteer basis...Is it worth the effort?"

January, 2022

"Costs have blown up. As we reopen the full effect of AB5 and inflation are going to take a massive toll."

"We don't want to leave CA and we don't want to close permanently, but both are probable if AB5 carve out is not achieved ASAP..."

"The uncertainty of the pandemic and constantly shifting protocols makes it almost impossible to plan for future projects and events."

"We are doing the best we can with what we have to work with."

"We are hanging by a thread."