

PREPARED BY:
LONG ISLAND ARTS ALLIANCE

WITH SUPPORT FROM:

LI
CF LONG ISLAND
COMMUNITY
FOUNDATION

LIARTS

COVID-19

LI ARTS IMPACT SURVEY



OUR THANKS

On behalf of Long Island Arts Alliance, I would like to thank everyone who participated in the survey.

This important work would not have been possible without support and funding from the Long Island Community Foundation. LIAA continues to work tirelessly to ensure that the arts and culture sector emerges from this crisis stronger and more sustainable. I am so grateful to our sector, even through all of the incredible challenges over the past year you all have been able to find innovative ways to share the power of artistic expression and education beyond your usual screens, stages, and spaces; all in an effort to inspire and engage our community.

With the light at the end of the tunnel finally in sight, we look forward to working with the civic, corporate and philanthropic communities to support your efforts and help pave a way towards recovery and revitalization. More soon...

Sincerely,



Lauren Wagner

Director

0. INTRODUCTION



Long Island Arts Alliance presents the COVID-19 Arts Impact Report, providing the most complete view thus far of the economic, social and programmatic damage inflicted on the region's arts and culture sector by the pandemic. The survey and the corresponding Arts Action Plan was supported by the Long Island Community Foundation. The goals for this survey were as follows:

1. **Identify Needs:** This survey will help determine how we can best support our members during this unprecedented time;
2. **Inform Funders:** Using the information collected through this survey, LIAA will produce a report demonstrating the need for emergency funding for the creative sector affected by COVID-19 as well as the full economic impact it has had on our region;
3. **Share Information and Experiences:** We will share the survey results, connecting arts and culture organizations across the island, and uniting the voices of these diverse institutions with the goal of facilitating strategic collaborations and innovative programming as we look to restart and rebuild the sector;
4. **Archive:** We will create an evolving, historical record of the COVID19 crisis and its impact on our region's creative sector.

The following report will outline key findings from the survey, including significant programmatic and financial losses. **The data points to a \$49.4 million dollar loss in total revenue**, this accounts for only the losses reported by survey respondents, and is likely significantly higher sector-wide. While sorting through the data, LIAA referenced the Americans For the Arts "Arts and Economic Prosperity 5" study to estimate the economic impact the closure of our sector has had. **Based on their average per person audience expenditures and the total attendance loss reported by the survey (939,000), LIAA estimates a loss of \$29.5 million dollars in economic impact.** The pandemic continues to have drastic effects on the individuals who work in the arts and culture sector and those who benefit from their programming. **More than 2,000 individuals' jobs have been affected**, including layoffs, furloughs, and reduced hours. Once again, these numbers are solely based on the responding organizations, and is likely considerably greater sector-wide.

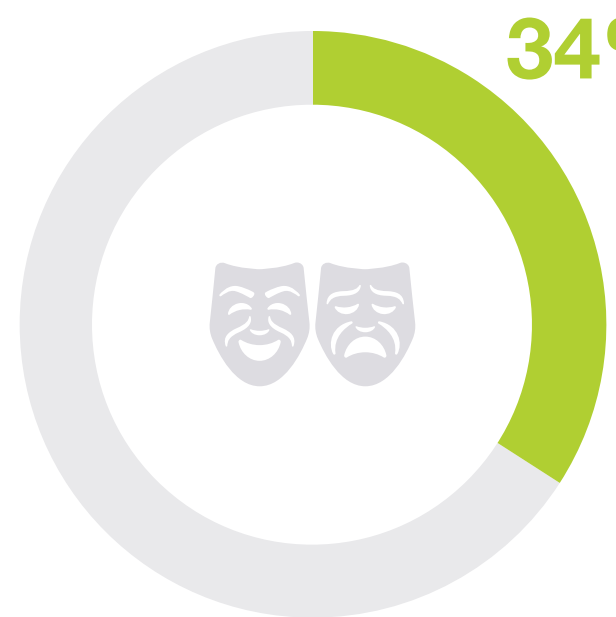
These staggering numbers and the value of the arts can be a useful tool in a reopening marketing campaign that illustrates the impact of the arts on Long Island's economy, education, wellness, and more. This campaign should be part of a comprehensive recovery plan that positions the arts to endure this crisis and continue to provide opportunities for safe, meaningful connection for Long Island communities.

Aside from the immediate need for funding, the biggest challenge facing our sector is the uncertainty of when operations can resume to "normal" and the impact that has. The future of our sector is still unclear. Some cultural organizations have the resources to sit it out for an additional six-months to a year, but many do not.



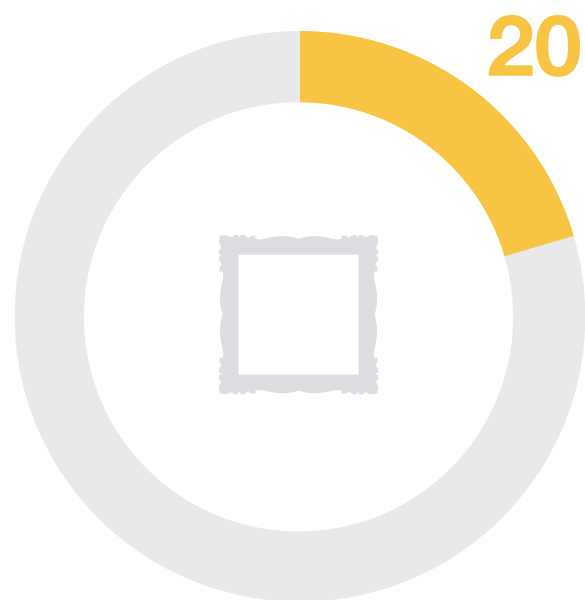
1. SURVEY RESPONDENT INFORMATION

BREAKDOWN BY SECTOR / PRIMARY DISCIPLINE



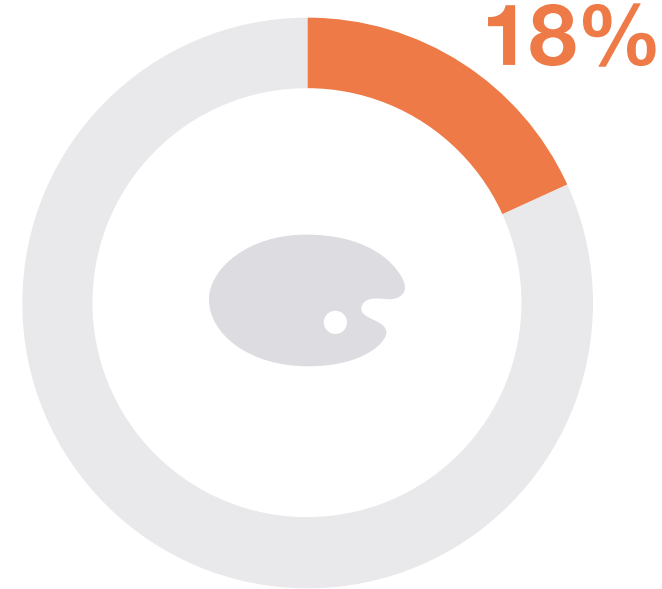
Performing Arts

Theater, musical theater, music, dance, opera, performance art



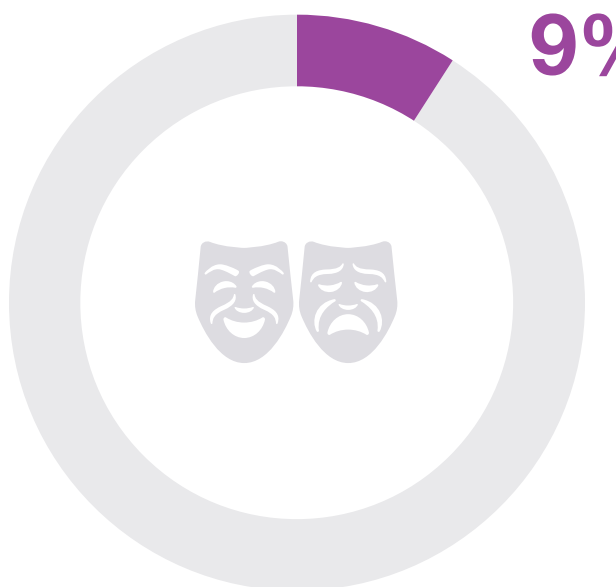
Visual Arts

Galleries, visual art museums, outdoor sculpture parks, art



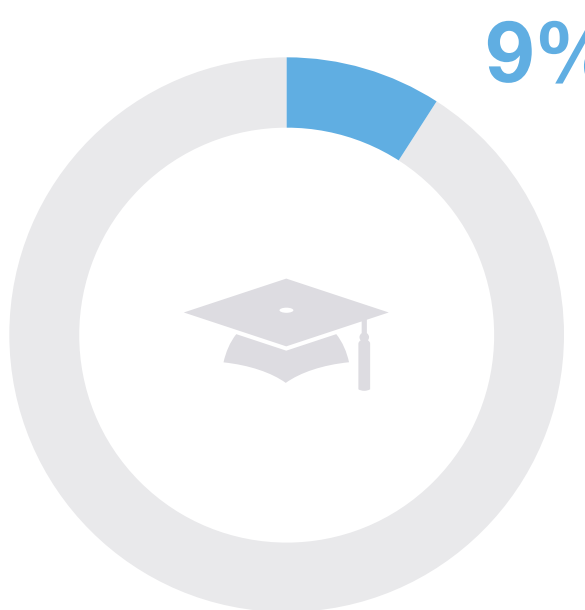
Arts Councils

Arts councils, arts service organizations, arts advocacy organizations



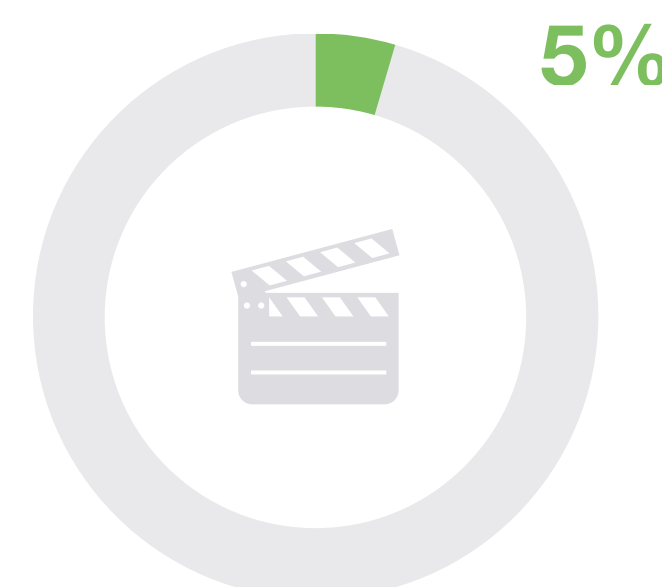
Cultural Centers

Non-visual art museums, historical societies, community centers



Education

Summer camps, art schools, arts education



Film & Media

Independent and art-house cinema and media

ORGANIZATION LEGAL STATUS

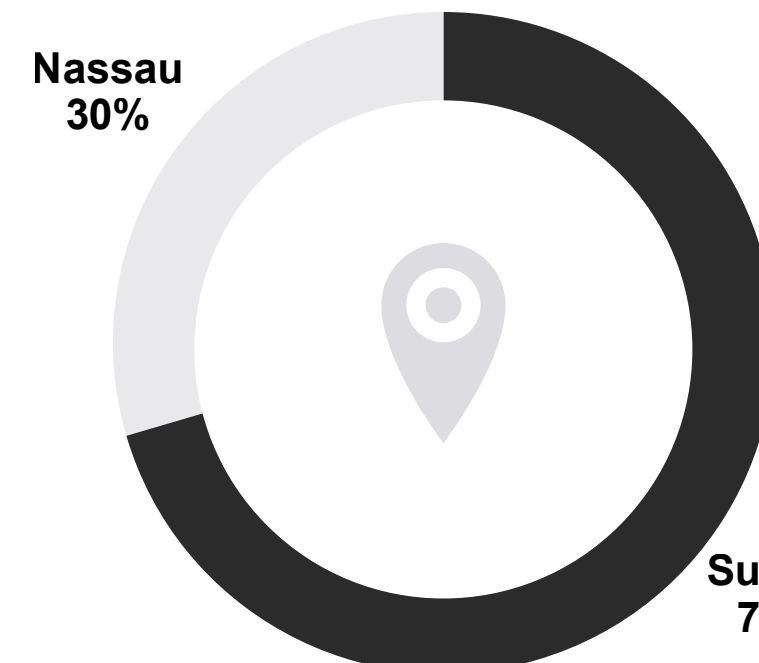


89%

NON-PROFIT ORGANIZATION

89%

LOCATION / PRIMARY AREA SERVED



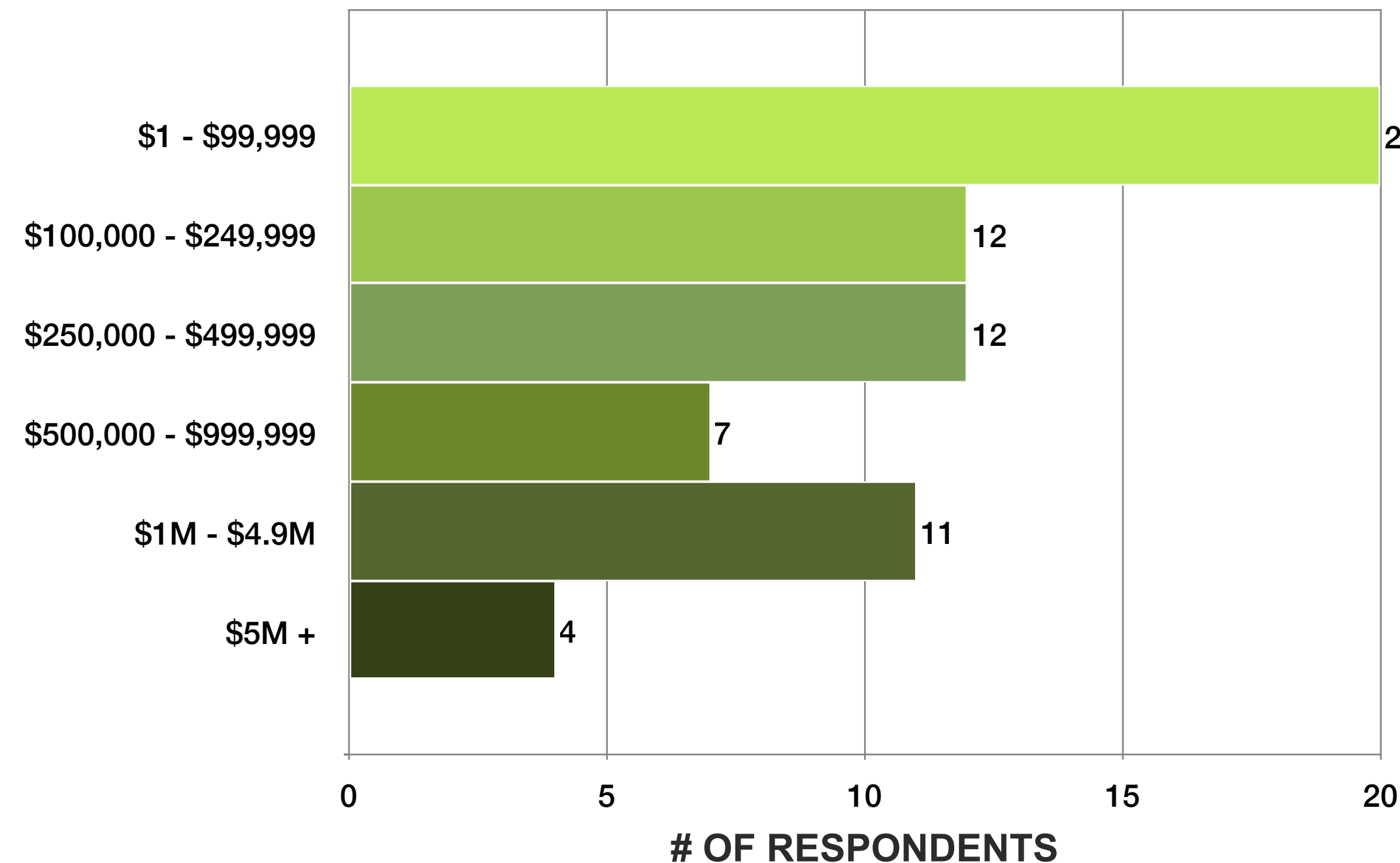
Nassau
30%

70%

SUFFOLK COUNTY

Suffolk
70%

PRE-COVID ORGANIZATIONAL BUDGET



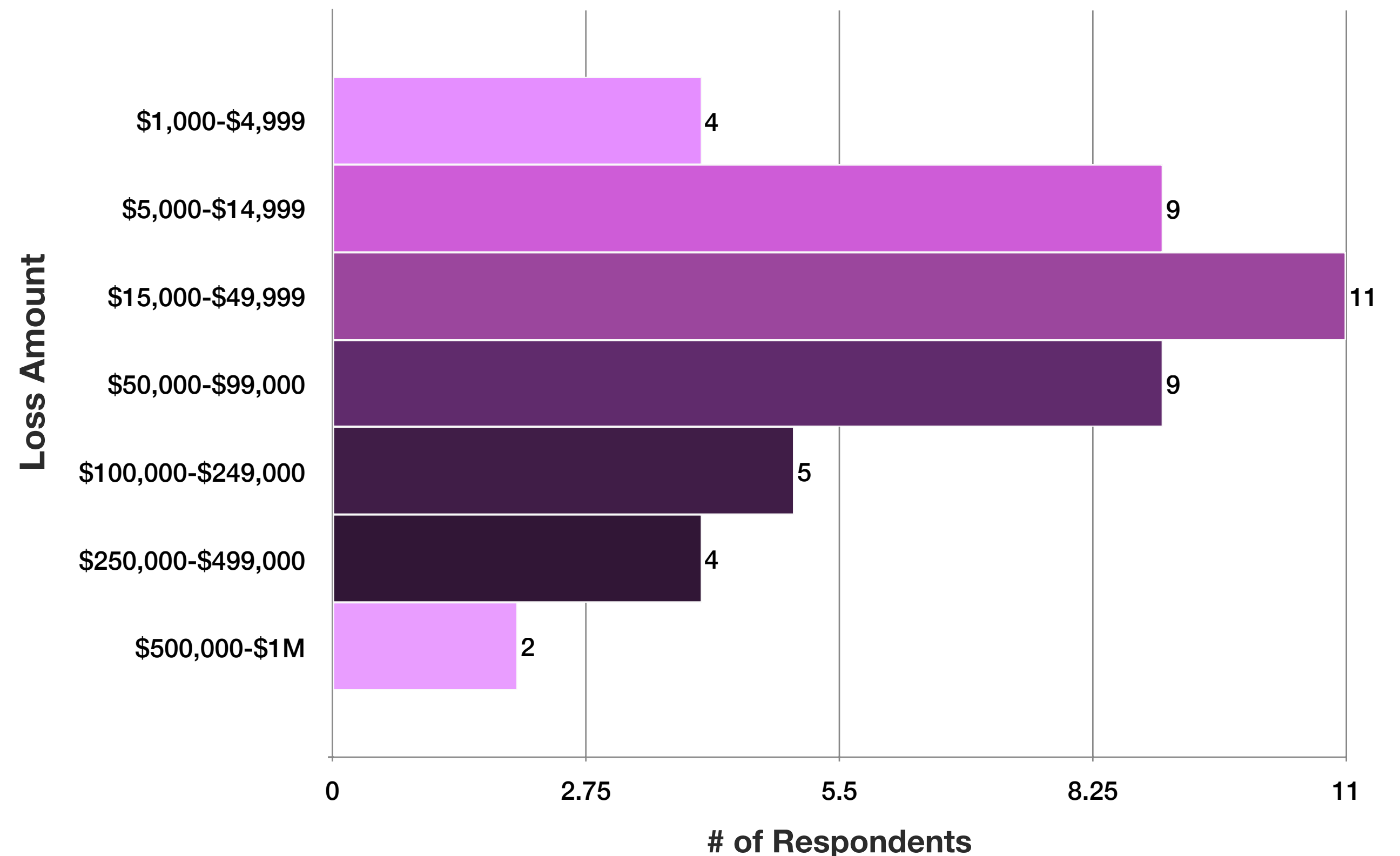
2. FINANCIAL IMPACT

Non-Admissions Income

- When asked if their organization has experienced a loss of non-admissions income as a result of the pandemic, **77% (51 respondents) answered YES, 12% (8 respondents) answered NO, 11% (7 respondents) did not answer**
 - Of the 51 respondents that answered YES, 7 did not specify dollar amounts in the follow up questions. These 7 respondents were removed from the calculations.
- Of the respondents who have reported a loss of non-admissions income due to the pandemic, the **cumulative loss is \$4,417,166**. This amounts to an **average loss of \$99,162**.
- 63% reported a loss of under \$100,000 in non-admissions income.
- Respondents were asked to identify **areas to which they attributed significant loss of non-admission income**. The most common answer was **loss of individual donations** (cited by 29 respondents), followed by **loss of sponsorships (26), grants (16), fundraisers (15), advertising income (9), concessions (5), memberships (4), class tuitions (4), and gift shop sales (2)**.

Non-Admissions Income (LOSS PROJECTED THROUGH MARCH 31, 2021)

TOTAL LOSS **\$4,417,166**
AVERAGE LOSS **\$99,162**



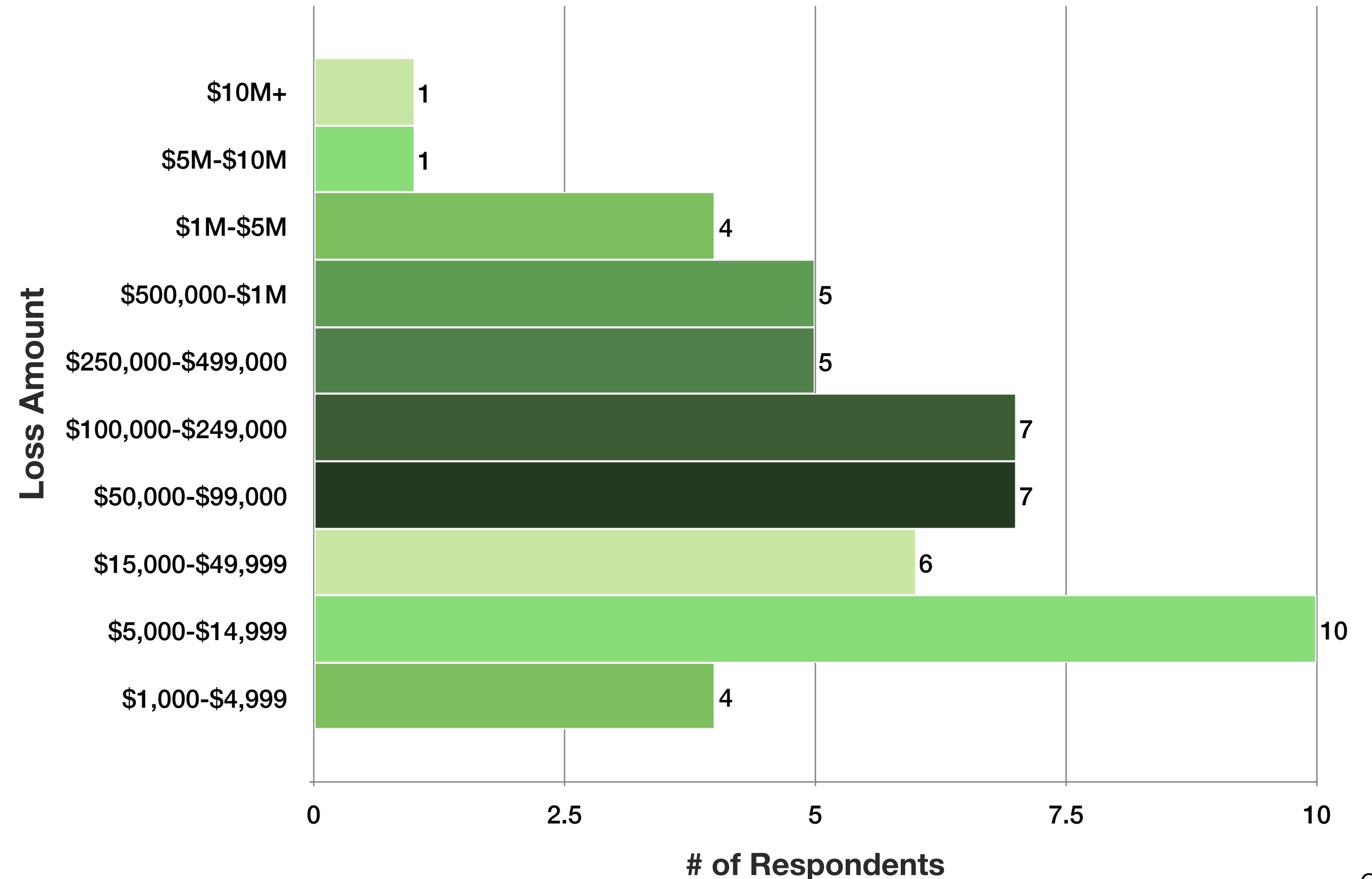
3. FINANCIAL IMPACT

Admissions Income

- When asked if their organization has experienced a loss of admissions income (program service revenues) as a result of the pandemic, **82% (54 respondents) answered YES, 9% (6 respondents) answered NO, 6% (4 respondents) did not answer**
 - Of the 54 respondents that answered YES, 4 did not specify dollar amounts in the follow up questions. These 4 respondents were removed from the calculations.
- Of the respondents who have reported a loss of non-admissions income due to the pandemic, the **cumulative loss is \$44,976,382**. This amounts to an **average loss of \$899,527**. It should be pointed out that larger organizations, with greater losses are skewing the average values away from the true middle of the reported data.
- Responding organizations cited **difficulty placing value on digital content, controlling online ticket transactions, obtaining technical equipment and relevant training** as the top hurdles when trying to make up for lost admissions revenue through virtual platforms.
 - Many started off offering programs for free at the beginning of the pandemic, and had difficulty transitioning to a paid model.

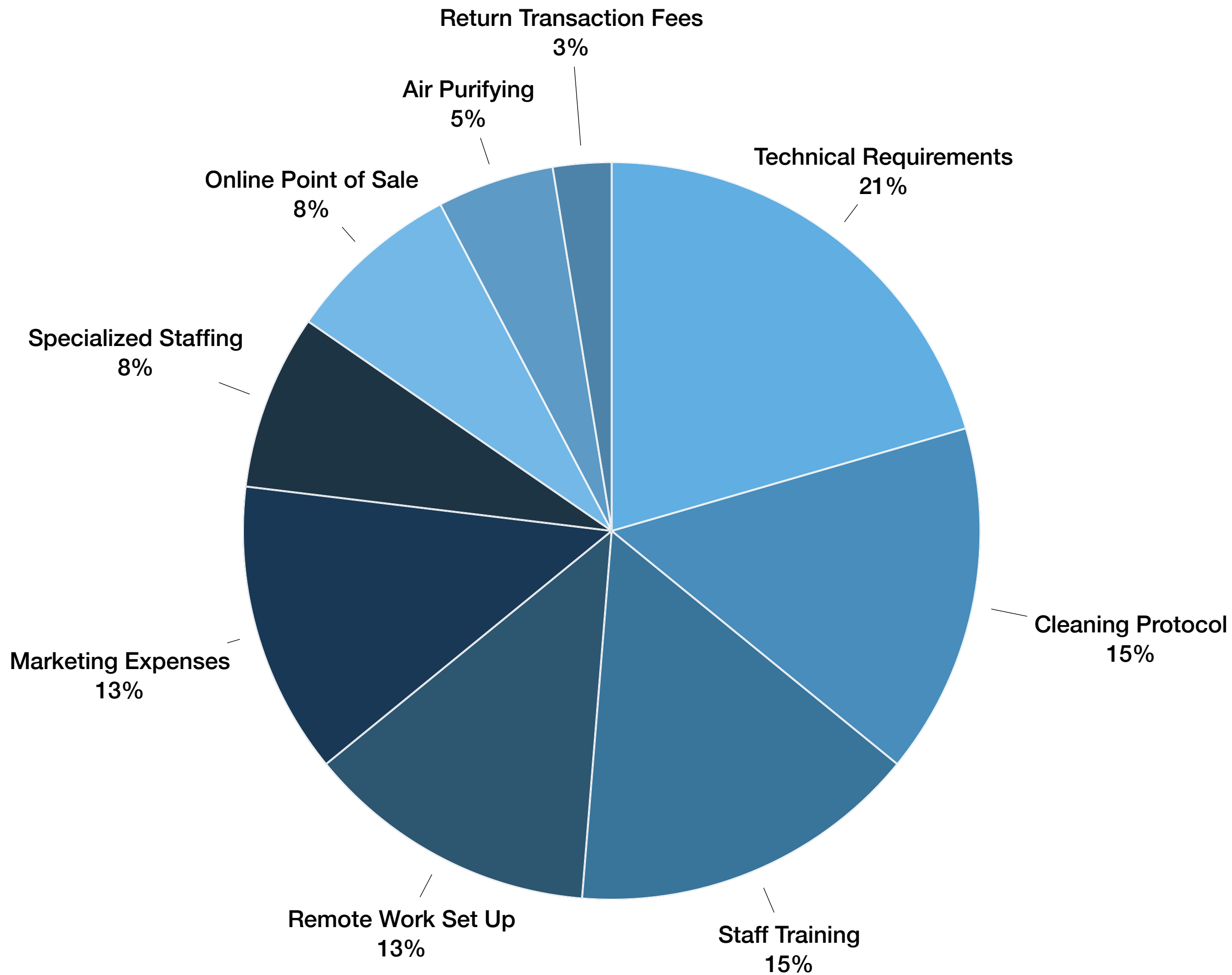
Admissions Income (LOSS PROJECTED THROUGH MARCH 31, 2021)

TOTAL LOSS **\$44,976,382**
AVERAGE LOSS **\$899,527**



4. FINANCIAL IMPACT

AREAS OF SIGNIFICANT EXPENSES



Unanticipated Expenses (LOSS PROJECTED THROUGH MARCH 31, 2021)

TOTAL EXPENSES **\$552,339**

AVERAGE **\$20,457**

Unanticipated Expenses

- Respondents were asked whether or not their organization incurred any unanticipated expenses as a result of the pandemic, 59% said YES (39 respondents), and 41% said NO (27).
 - Of the 39 respondents that answered YES, 6 did not specify dollar amounts in the follow up questions. These 6 respondents were removed from the calculations.
- Of the respondents who have incurred unanticipated expenses due to the pandemic, the **cumulative loss is \$552,339**. This amounts to an **average loss of \$20,457**.
- Areas of expenses were spread pretty evenly throughout the nine categories listed in the chart to the left. Most cited was **Technical Requirements (21%)**, **Cleaning Protocol (15%)**, **Staff Training (15%)**, **Remote Work Set Up (13%)**, and **Marketing Expenses (13%)**.

3. HUMAN & ECONOMIC IMPACT

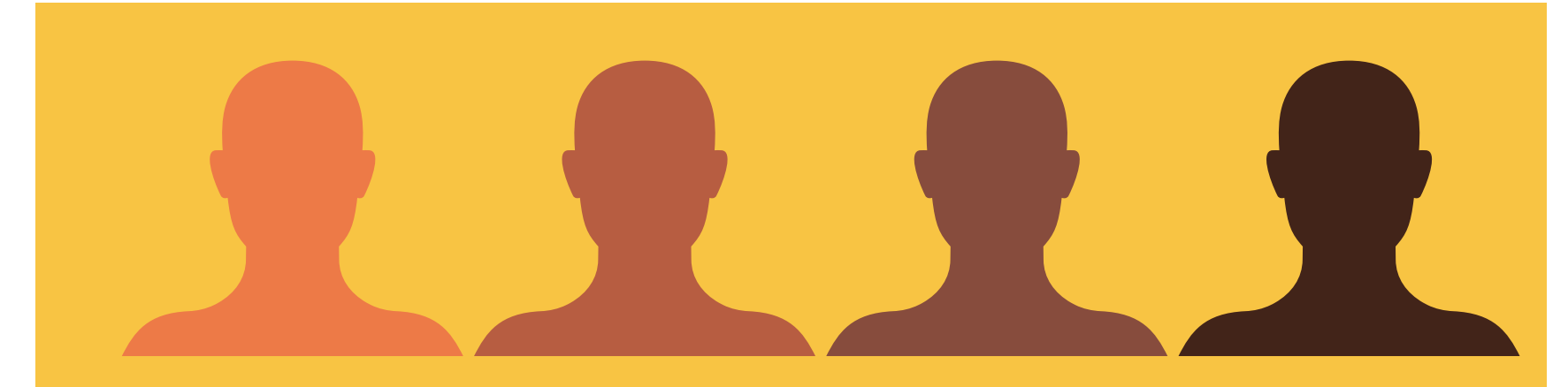
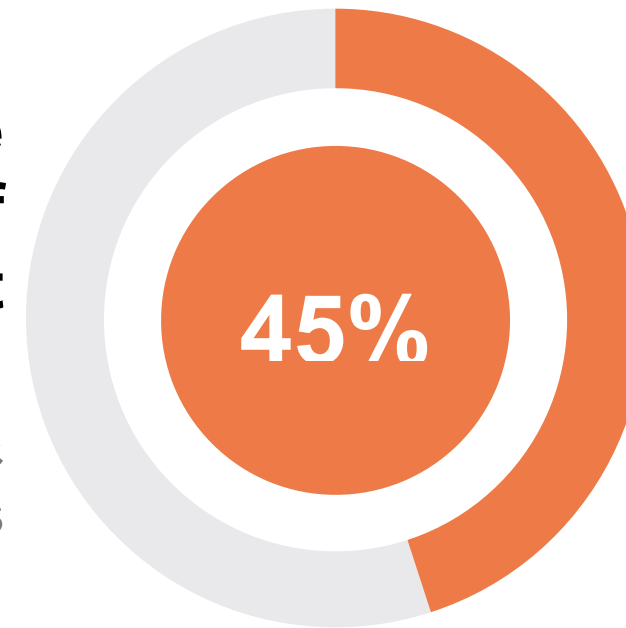
Arts and culture play an important dual role in our region. It is a vital business sector, employing thousands of artists, educators, performers, administrators, designers, and it drives economic activity supporting local tourism, hospitality, retail, and restaurants.

2,355
ARTS & CULTURE
JOBS AFFECTED IN
THE PAST YEAR



Responded that they have reduced their levels of employment

This includes lay-offs, furloughs staff & reduced hours



939K
LOSS OF ATTENDANCE
AVG REPORTED LOSS: 14,663

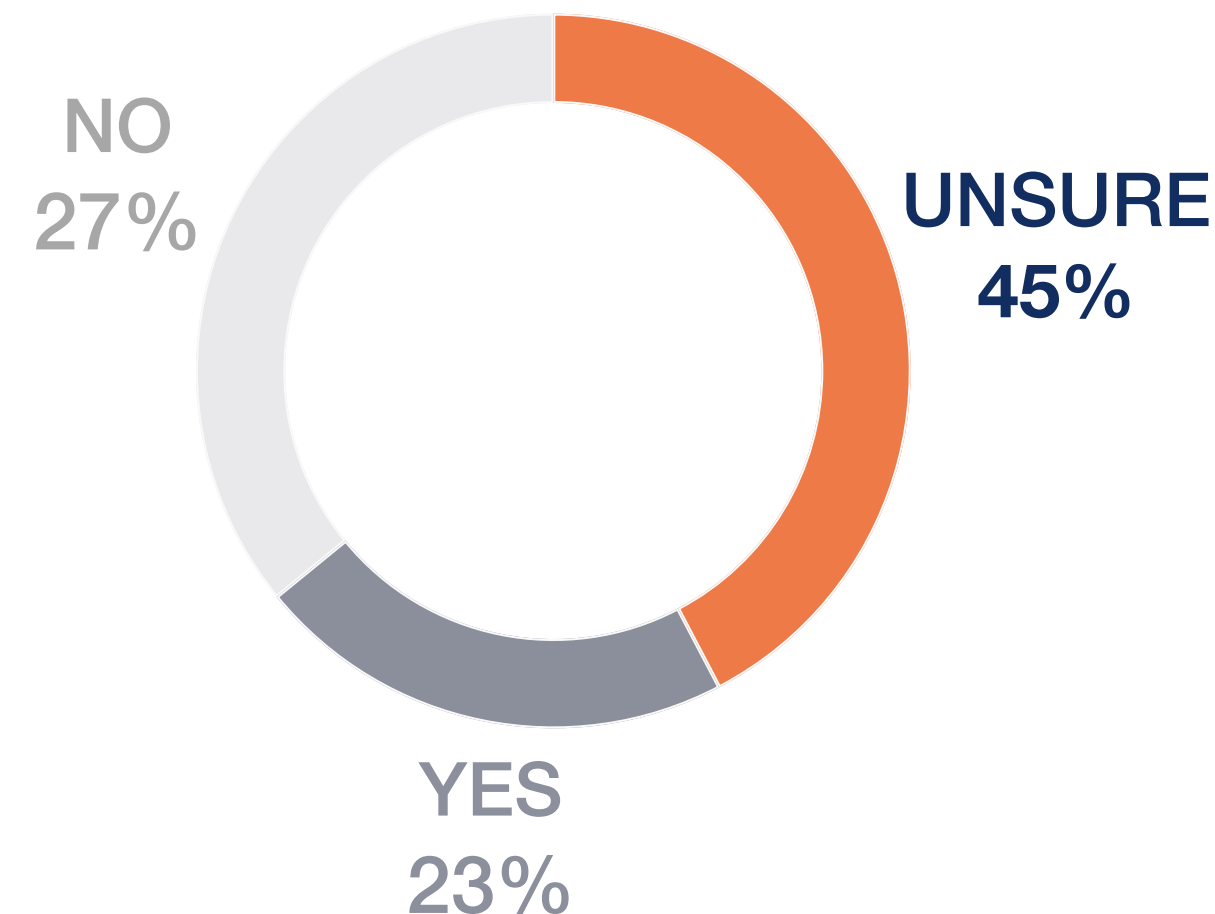


29.5M
LOSS EVENT-RELATED SPENDING
(ECONOMIC IMPACT)

Based on Americans for the Arts AEP5 calculation of average audience expenditures per person, per event - \$31.47

(PROJECTED THROUGH MARCH 31, 2021)

Do you anticipate that your organization will return to its pre-covid staff by the end of 2021?



"We will be reducing programming that we present by about 25%... Many full-time department heads will be working without assistants and will need to take on multiple functions."

4. PROGRAMMING / ACTIVITIES IMPACT

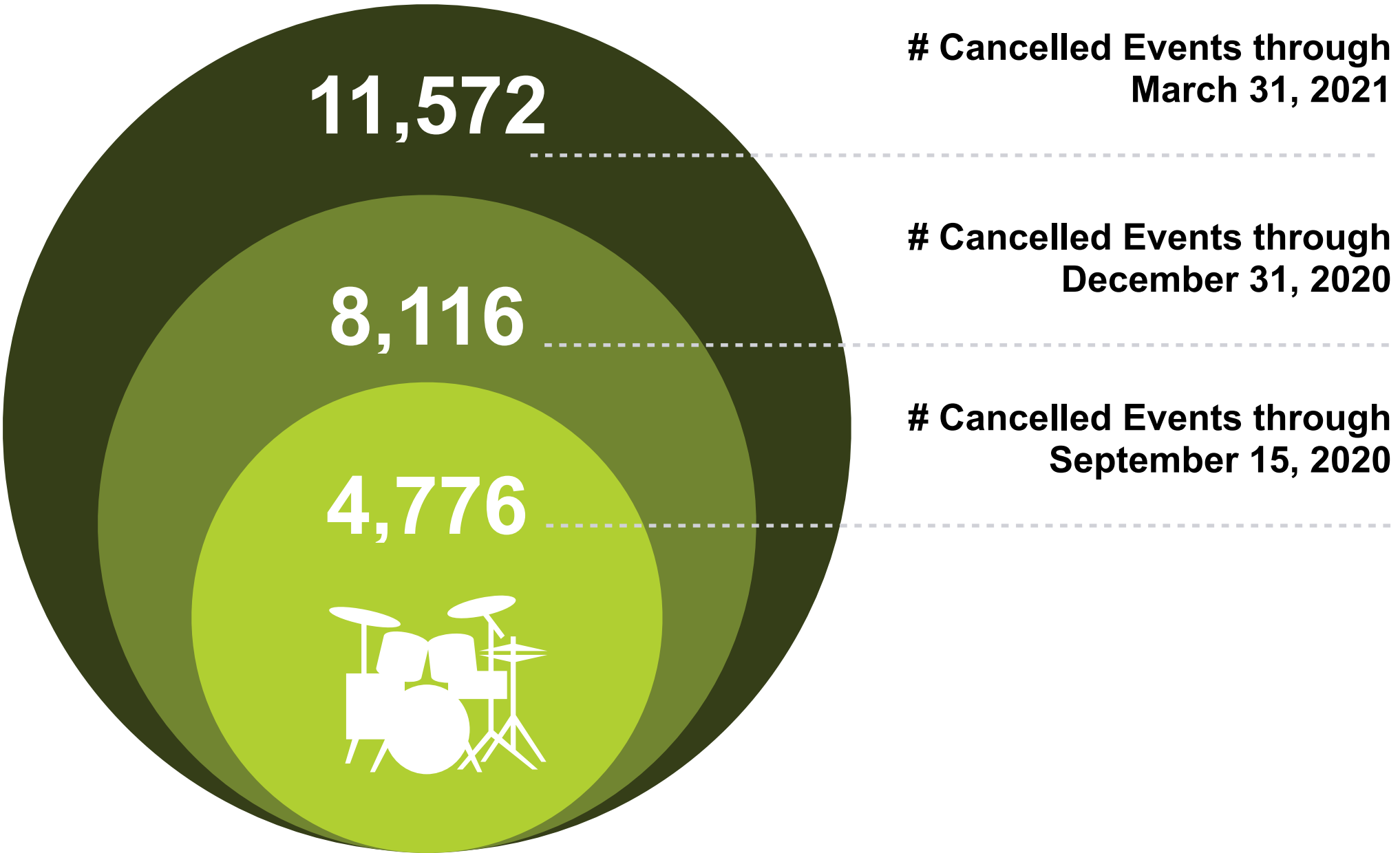
Events

- **98% of responding organizations have had to cancel events/ programs** (such as performances, exhibitions, classes, lessons, meetings and/or conferences, festivals, camps, readings, workshops, etc)
- **72% have modified delivery** of some of their programs
- As of September 15, **27% were not providing products or services to their communities**
- Many programs that serve populations in congregate settings (**senior living facilities, schools, group homes, medical facilities**) were affected, and are less likely to be brought online due to technical requirements and support staffing.

Virtual Programming

- Adapting to digital programming did not come without its challenges. The most common answers when asked to disclose specific challenges they faced when attempting to bring programs online were, **audience's access to and knowledge of technical requirements, equipment, capacity, and technical ability.**
- Among the "Other" category, groups cite **screen fatigue, cost, and content creation.**
- A positive outcome from bringing programs online has been that respondents are **connecting with broader audiences.**

Respondents were asked at the time of survey to estimate the total number of in-person events they have had to/or are projecting to cancel based on the dates provided.



"Our monthly program for people living with with memory loss and their caregivers has been paused during the pandemic. We have tried our best to be able to continue to offer this program in a modified way, but the impact of the program has suffered"

"We are involved in offering **virtual programs with local libraries and museums**, and have developed a self guided cell phone tour and plan to continue these efforts in the future."

"During these challenging times, we've seen our **community come together and support us in many ways**. From exchanging their unused tickets for a charitable contribution to renewing their membership with no return in sight."

"The bright point is we have seen **increased reach to programs**, we believe we will always maintain a virtual component to all programs going forward, even if a lesser extent to what we are managing now."

"Our new virtual program will **extend the Museum's shared educational programming and unique learning opportunities** through improved technology to schools unable to travel to the Museum."

**WHAT HAS SURPRISED YOU?
WHAT ARE YOU MOST PROUD OF?
WHAT HAVE YOU LEARNED FOR THE FUTURE?**

"The future?
I'm just focused on getting through the week"

"We will continue to offer virtual programming after we reopen for in-person events. **We are reaching a different, and sometimes new, audience.**"

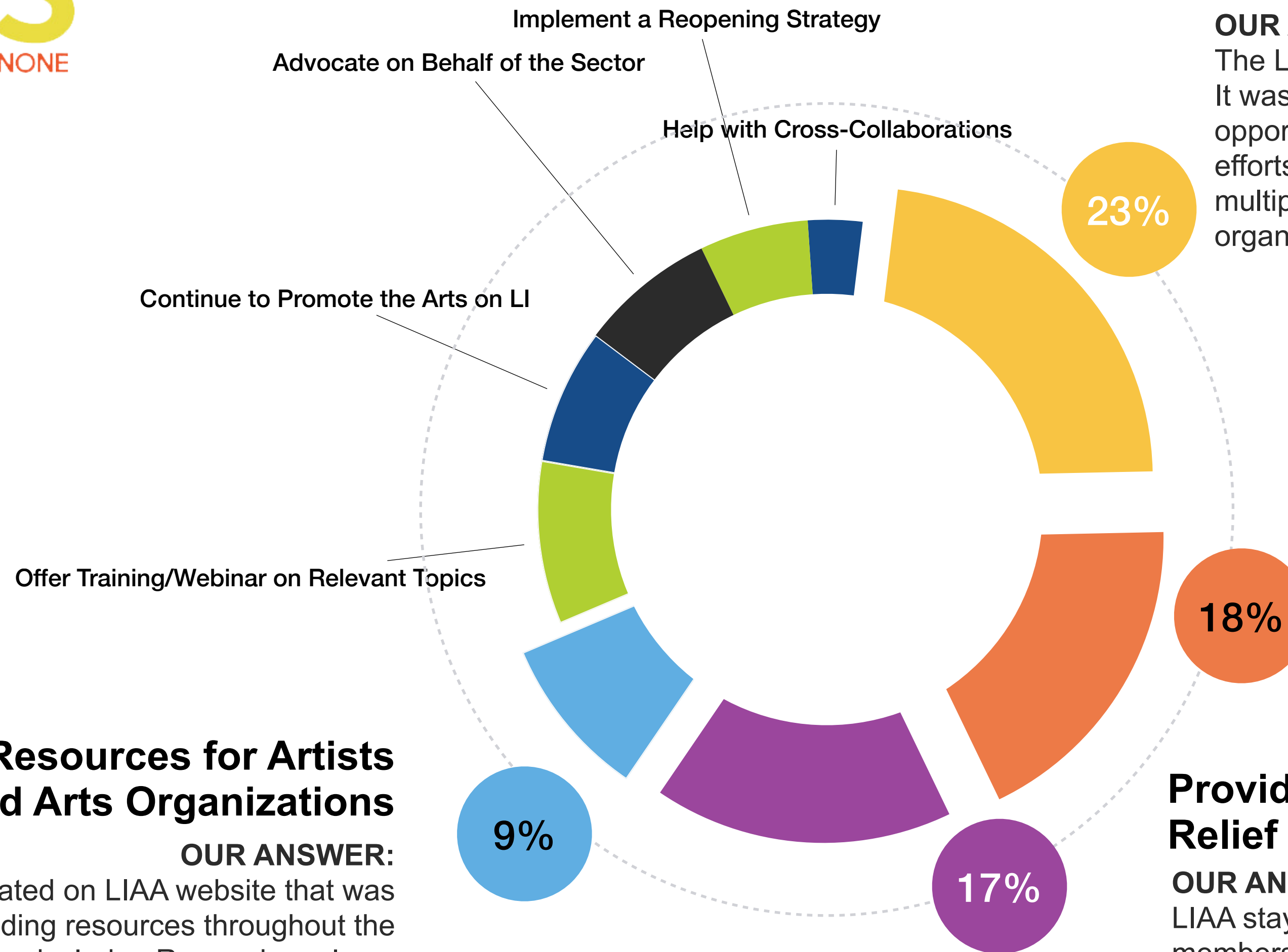
"We immediately offered free daily online programs for our community that was one of the most affected on Long Island. (Brentwood and Central Islip). **We offered workshops on art, dance, writing, open mic and community spaces to unite as communities as we suffered the death of many members of our community.**"

"**We are weathering the COVID crisis as best we can.** While we are struggling with a lack of income, we have received help from the SBA, allowing us, for now, to maintain our staff. This is not sustainable. We are exploring long-term solutions to keep our doors open"

"As a result of the pandemic... we will **seek a more diverse revenue stream from more diverse programs** online and onsite that serve an expanded age population over an expanded number of months."

5. HOW CAN WE HELP?

Survey respondents were asked how LIAA could best serve their organizations. Responses were categorized into nine categories based on common themes.



Help Source Funding Opportunities

OUR ANSWER:

The LIAA Newsletter went from biannually to biweekly. It was used to share grants and other funding opportunities available to arts organizations. Our efforts did not go unnoticed, and we were informed of multiple grants were secured from member organizations as a direct result of the newsletter.

Marketing & Promotion of Virtual Events

OUR ANSWER:

LIAA significantly grew our social media platforms throughout the pandemic (Instagram- increased by 1,929%, Facebook- increased by 210%). These channels were used to promote member events and programs. The groundwork for an arts-specific online calendar was created on the LIAA website, and will be an integral tool in marketing arts events across the Island.

Share Articles and Resources for Artists and Arts Organizations

OUR ANSWER:

A page was created on LIAA website that was dedicated to providing resources throughout the pandemic. Categories include: Reopening plans, Digital Programming, Fundraising, Resources for Artists, Arts Educators, and Organizations

Provide Information and Guidance on COVID Relief Programs

OUR ANSWER:

LIAA stayed up to date on all government relief programs, and kept members informed so they could plan accordingly as well as be prepared for all necessary items involved. Many members contacted us with direct questions, and we were able to provide answers and guidance on the often confusing language associated with these programs.