

Performing Arts Coronavirus Impact & Response Benchmarking

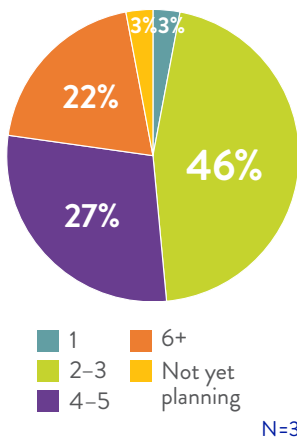
MAY 13, 2020

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



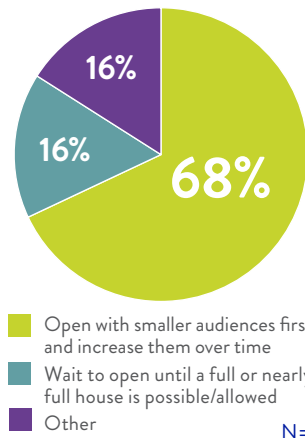
Counting on Additional Waves

Orgs Planning for Possibility of Future Closures



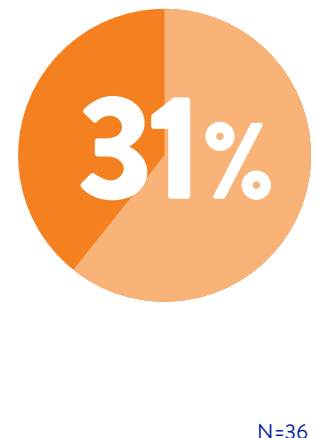
Most Plan to Open Small

Most Likely Reopening Scenario



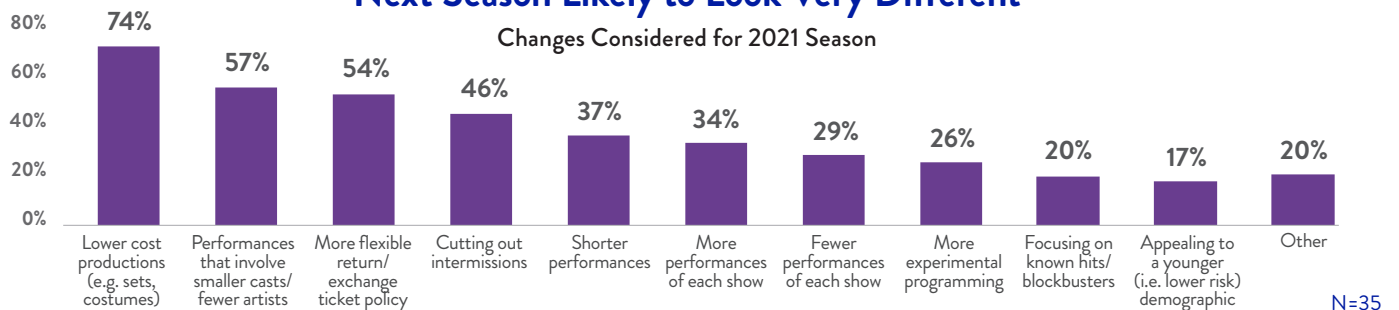
Significantly Reduced Seating

Venue Capacity with Social Distancing



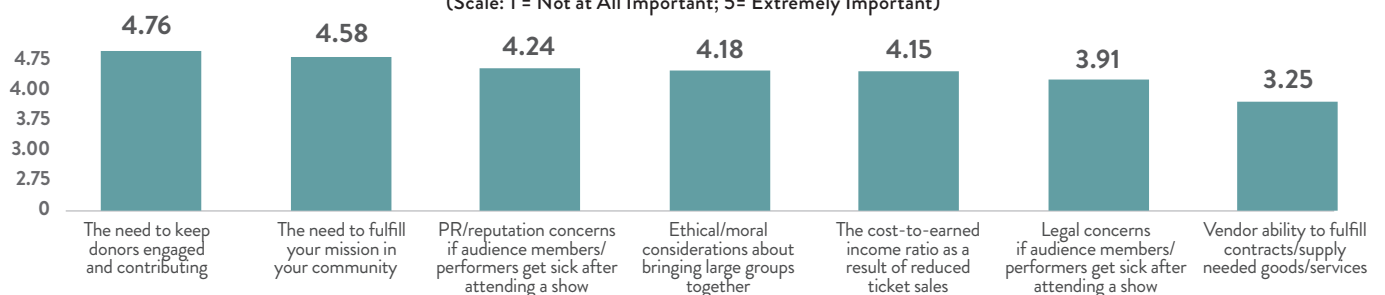
Next Season Likely to Look Very Different

Changes Considered for 2021 Season



Donor and Mission Considerations Most Pressing

Mean Importance of Reopening Considerations (Scale: 1 = Not at All Important; 5 = Extremely Important)



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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”