Arts Organizations' Early Response to COVID-19 Uncertainty: Insights from the Field

October 2020

Table of Contents

Executive Summary

This rapid evidence review was undertaken between mid-March and June 2020, at the inception of a period of tumultuous change and uncertainty for all sectors of social, cultural, and economic life in the United States. The pandemic itself; the response to it by public health authorities; the economic fallout; and the anticipated but as yet unknown behavioral implications have together created the greatest challenges of most arts sector employees' professional lives. The civic movement for racial justice that was triggered by the killing of George Floyd by the police in Minneapolis on May 25, 2020 – the middle of the period of this exercise – provided a further lens on the pandemic, as the pandemic has both revealed and accelerated racial inequities in a highly visible manner. The demand that the cultural sector and its leaders address issues of systemic racism and social justice with greater urgency than they have to date is undoubtedly now an institutional imperative that now stands alongside the pandemic in its salience for arts leaders.

The evidence gathered in this review suggests that positioning, programming, and business modelling that focuses on **relevance** and **resilience** offers the best prospect of success across a range of future unknowns. These two terms, in turn, contain a cornucopia of potential strategies, some of which are already evidenced and others of which inevitably are more speculative. This report covers both, addressing:

1. Initial observations from the field on the implications of the crisis on operating models and anticipated outcomes for the not-for-profit arts sector;

2. The levers, mechanisms, and strategies being used or considered;

3. The needs and priorities identified by sector leaders to navigate the implications of the pandemic.

Excerpts from survey of arts leaders
Audience behavior
73% agree there may be an increase in socio-economic divide in propensity to participate in person
Income sources 5 years from now
54% expect decrease in ticket sales; **35%** expect increase in online retail profits
Future operations (2–5 years from now)
79% expect a change in diversity and quality of digital programming; **59%** expect introduction of new income streams
Dealing with impacts of the COVID-19 situation
Access to reliable audience data and projections; business modeling and scenario planning tools; and leadership skills are seen as equally important

The observed implications of COVID-19 on arts organizations underscore trends already in evidence: the fragile and unsustainable nature of the business models in the arts; the need for greater understanding of audience behaviors and preferences; the imperative to develop a compelling online presence; the need to revisit the strategic alignment between programs and mission; strained relations between artists, creatives with a contingent employment relationship to institutions, and institutional leadership (at executive and Board levels); and the impact of modest reserves of working capital that many smaller and minority organizations have. Many arts leaders expressed concern for wellbeing of their organizations' staff and artists working in the sector given the pressures the pandemic has put on their personal and professional lives.

In their response to the impacts of the pandemic, the leaders of arts organizations are exploring new strategies and approaches across the following areas:

- **Organizational planning for short, medium, and long term** – including scenario planning and revisions to strategic and business plans.

- **Programming** – taking measures to adapt to physical distancing requirements, accelerating digital production and distribution, and findings ways to support individual artists and creatives.

- **Income generation** – arts organizations are focusing on emergency relief fundraising and generating support from private and philanthropic donors, while also seeking ways to monetize digital programs and, in some instances, generate income for individual artists through new partnerships, platforms, and commissions.

- **Audience engagement** – the move to digital offers greater reach (not limited by geographic location) while racial justice movement is bringing to the forefront the issues of access and inclusivity, where minority arts organizations are better suited to engage with the local and global communities.

- **Work force and leadership development** – some organizations seek to restructure and 'upskill' their staff and leadership to address the need for digital content production and distribution and new channels for income generation.

- **Physical infrastructure** – the organizations with buildings or in pursuit of capital projects are considering new ways to utilize cultural infrastructure that may never return to pre-COVID-19 occupancy rates. This may generate new models of civic and community uses; retail; food and beverage; education uses; special events (e.g. virtual fundraising events for other non-profits); as well as conversion to smart and digital buildings.

- **Lobbying and collaboration** – formal and informal networks have been formed to advocate for the federal, state, and municipal funding for the sector and to jointly seek solutions to the effects of the pandemic on artists and arts venues.

The last section of this report summarizes the needs and priorities expressed by the leaders in the arts sector as they address the impacts of the pandemic on their organizations:

- Short- and mid-term operating funding, and more flexibility in the eligibility criteria set by philanthropic funding programs.

- Continuous data collection and analysis, and skills and technology to support that.

- Digital innovation and production and new collaborations and skills to advance research and development of the digital production and distribution of artistic content.

- Diversification of Boards, executive leadership, and staff and their respective skillsets to allow for greater accountability, transparency, inclusion, and innovation – including building business modeling skills for arts leaders.

- Partnerships with other sectors on artistic, education, and community programs.

- Exploring the viability of organizational and business models alternatives that provide opportunities beyond the not-for-profit, 501c3 model prevalent in the sector.

There were commonalities in the preoccupations of interviewees and broad assumptions if not yet in articulated strategies, among them are: a sense that however the U.S. emerges from the immediate crisis of COVID-19, it will be into a less predictable and more turbulent operating environment; a need to engage with virtual content in a systematic and strategic way as a permanent part of artistic creation and distribution; a greater openness to experimentation and innovation; and a realization that during a period of economic recession 'relevance' – a short-hand for perceived social impact – will be paramount if current levels of philanthropic giving are to be maintained.

While there are yet no clear or universals paths for performing or visual arts organizations to navigate the impacts of the pandemic, the findings of this study present some tactical and strategic opportunities for the arts organizations to achieve greater resilience and relevance in the current period of crisis and social change. To help further the development of these opportunities, the Wallace Foundation is also publishing a set of scenario planning tools for the arts sector – developed by AEA Consulting with input from sector leaders and organizational planning experts from other industries – looking out to possible futures over the next five years, to help sector leaders shape their response.

Introduction

The Wallace Foundation commissioned AEA Consulting in March 2020 to undertake a rapid evidence review addressing:

- The possible longer-term implications of the COVID-19 pandemic for business models of visual and performing arts organizations;

- Ways in which leaders in the sector are positioning their organizations to accelerate changes to their business models; their rationales for these changes and the resources, data, or knowledge they identify as needed to do this effectively; and

- The scenarios and strategies proposed in relevant sectoral and related writing including grey literature, podcasts, webinars, and periodicals.

To this end AEA undertook 44 interviews of arts leaders and others with an informed perspective on the sector and surveyed a further 118, as well as following closely commentary and reportage in the professional and general press and social media. We interviewed 7 arts leaders from outside the US in order to add a comparative element.

The impact of the pandemic – and the cluster of recursive second order effects – is similarly not uniform and therefore, importantly, neither the actions nor the perspectives of arts leaders to it are, either. With the continued challenge that control of the virus presents in the United States, it is increasingly the perspective of the sector that we are, in effect, already *in* the "next normal" and that we will remain in the current situation until such time as an effective antiviral is widely available or, possibly, that the virus is so prevalent that some sort of "herd immunity" is developed. (This is not the case where public health policy has been more effective.[1])

This change of prevalent perspective or consensus happened over the period of our study and will doubtless continue to morph as new evidence – positive or negative – is generated and assimilated. But the move from thinking of the pandemic as an acute event to thinking of the pandemic as a chronic condition is a profound one, especially for those seeking parameters in which to plan. The planning horizon of, say, the next two years now seems to most boards and executive leaders to be a reasonable one. Planning for five or ten years out – a norm pre-pandemic – seems to many interviewees to be an indulgence rather than an imperative. Horizons have been definitively foreshortened as a result of the interaction of the virus and US public health policy.

The differential impact of the pandemic becomes more relevant the longer the pandemic endures or is believed to endure, and the greater we need to understand the asymmetries inherent in it, as the more significant they are become. Some are already apparent:

---

[1] See for example interview with Elke Buhr, Chief Editor of Monopol, on Germany's current reopening of the performing arts, July 7 2020, https://vimeo.com/436160707

- Organizations that are more dependent on earned income generated on site are being impacted more directly than those that are not and will remain so until such time as they can regain the footfall required to regenerate that income;

- Organizations with a high ratio of variable to fixed costs are at a financial advantage as they can reduce their total expenditure more easily;

- If skilled staff and associates (contractors, free-lancers etc.) are treated as variable costs to be minimized then all other things being equal, the longer the duration, the greater the dissipation of expertise – and the greater the suffering and dislocation experienced by that sector of the creative economy;

- The performing arts in most traditional in-door configurations have a set of challenges relating to social distancing (pinch-points in lobbies, on stage, and backstage) that are not present to the same degree in the visual arts and museum sectors and therefore are likely to reopen more slowly;

- Organizations that have significant reserves of working capital can plan further forward – and survive longer as semi dormant entities - than those without, as can those whose boards can and are willing to offer substantial financial support. This tends to favor longer- established organizations, and disadvantage smaller, less well capitalized organizations with more financially diverse boards – which often includes minority and community organizations;

- Older people are expressing greater caution about being in crowded spaces in the medium term than younger people, based on their understanding of their physical vulnerability; and the higher their level of formal education, the more closely they are following developing scientific understanding of the mechanics of disease transmission. This means that all other things being equal, arts organizations with older audiences or with audiences with a higher level of educational attainment will experience a slower return of live audiences;

- Long haul travel for reasons of tourism is anticipated to be adversely affected for a prolonged period both by formal travel restrictions and by behavioral changes. The greater proportion of an organization's visitation or audience is from tourism, the more adverse the impact of the pandemic in the medium term.

There have been fewer signs than one might have anticipated of concerted collected action in the cultural sector – strategic partnerships and alliances, consolidations of back office or related functions, all of which were discussed in previous periods of crisis (primarily 2001, 2008). There has been much comparing of notes in webinars and online; and there have been some notable collaborations among funders. But sectoral or sub-sectoral initiatives in the field are not yet strongly in evidence. This may simply be the force and speed of events currently preventing it happening. But it may also be that the *differential* impacts of the common driver (COVID-19) are so great that it is still difficult to identify common agendas.

There was, before the pandemic, an awareness of a growing 'fault line' between established usually building-based institutions in traditional art forms – often termed 'legacy institutions' – and smaller, more diverse organizations often with strong links to their immediate geographic communities; missions that embrace both cultural and civic goals in equal part; but without the financial advantages afforded by affluent boards and a strong balance sheet. As with other fault lines in society, the pandemic appears, anecdotally, to be exacerbating this divide, certainly rhetorically but also in substance. Legacy organizations seem more inclined to 'sit it out' – that is, to accept the physical impossibility of an early return to pre-COVID-19 programming; develop their on-line presence; and explore limited outdoor performance, but without necessarily embracing this moment as a pivot point for profound organizational transformation. Others see it differently – and as an opportunity for a changed 'constitutional settlement' between the cultural sector and civil society. The fault line is not absolute, but it is nevertheless clearly observable, and it may grow more or less pronounced over time. There are not yet signs of collaborations across that line.

There were however commonalities in the preoccupations of interviewees and broad assumptions if not yet in articulated strategies. Among them:

- A sense that however the US emerges from the immediate crisis of COVID-19, it will be into a less predictable and more turbulent operating environment, and whether exogenous shocks come from the climate crisis, or international relations, or domestic 'culture wars' adaptability and resilience will be high on any institutional agenda;

- A need to engage with virtual content in a systematic and strategic way as a permanent part of artistic creation and distribution – to invest in the expertise and technologies of production and distribution required to make an impact in a crowded field and to figure out how supporting business models – whether through earned income or through the generation of philanthropic support;

- A greater openness to experimentation and innovation, to risk and the possibility failure and a desire to retain some of the agility gained during the period of 'scrambling' in the early months of the pandemic;

- A realization that during a period of economic recession, with many new demands on philanthropic sources, that 'relevance' – a short-hand for *perceived social impact* – will be paramount if current levels of philanthropic giving are to be maintained.

The picture that we are forming, drawn from the interviews, the survey, and grey literature consulted, is inevitably of an uncertain environment in which neither we (the observers) nor the field (the observed) can say with any certainty that what appeared to be working or not working before the pandemic will work or stall in the future. Medical science, public health policies, the state of the economy and the impact of the pandemic on the behavior of different sociodemographic groups suggest a wide range of possible operating environments for arts organizations. These 'drivers' as they emerge will also affect different scales and types of cultural organization in different ways.

The cultural sector has for some years been seeking to address a number of long-term factors affecting is overall health. These include:

- digital technologies' changing impact on the creative process, on performance capture and on distribution, and the challenges of developing viable business models around these;

- the impact of demographic change on visitation and implications for programming;

- changes in people's appetite for the experiential and what it means for different art forms;

- the growing desire for co-creation and for greater agency in the creative process among younger audiences;

- the sector's responsibilities vis a vis climate crisis and the implications of the climate crisis for the arts programming, operations and infrastructure;

- the rise of venture philanthropy and the challenges that the arts have in holding their own in a philanthropic marketplace that puts a premium on problem solving and social impact;

- the impact of the decline in K-12 arts education on long term participation;

- the changes in how leisure time is structured and planned and sliced and diced and the challenges this represents for subscription models and for long form works with set start times.

The exercise is also informed by the Wallace Foundation's recent commission of the National Center for Arts Research at Southern Methodist University (Zannie Voss) and the exercise on scenario planning which AEA has recently been contracted by the Foundation. While some of the findings are common with the larger cultural and creative sector or informed by adjacent sectors and organizations, the focus of this review is on not-for-profit visual and performing arts organizations based in the US.

1   Implications of COVID-19 for the Arts Sector

The pandemic is depriving the sector of earned income from its physical assets and is underscoring trends already in evidence: the imperative to develop a compelling online presence; the need to revisit the strategic alignment between programs and mission in areas like exhibition programming and education; strained relations between artists, creatives with a contingent employment relationship to institutions and institutional leadership (at executive and Board levels); and the impact of modest reserves of working capital that many smaller and minority organizations have. If the picture is not yet sharply in focus, one can at least distinguish some patterns described below.

Audience behavior

The consultation and analysis of secondary data completed for this review all unsurprisingly indicate that arts organizations are projecting a significant reduction in in-person attendance and occupancy of their venues and that the longer the period of time COVID-19 physically impedes live attendance, the longer the period of time will be required for attendance to reach pre pandemic levels. Many do not expect to *ever* return to pre-COVID-19 visitation levels – particularly those that have witnessed declining live attendance levels pre pandemic, as they see the pandemic as accelerating that decline. While it is not yet clear how audience groups are to return and when, projections suggest that younger and more loyal fans would return sooner than others.[2] In the event of severe recession, price sensitivity is expected to inform behavior: population groups across lower socio-economic brackets are less likely to participate and attend as unemployment rises and levels of disposable income drop. Older patrons are more likely to worry about the health and safety implications of close social proximity. To cater to differences in behavior across various generational and socio-economic groups, arts organizations recognize the need to carefully tailor programs and events to specific socio-demographic audience segments.

> *The arts sector is experiencing radical demand distraction. I don't believe demand will be restored to previous levels" – interview with a representative of a performing arts organization, June 2020*

---

[2] Consultation results; *After the Interval National Audience Survey* by Indigo Ltd in the UK, May-June 2020.

Several nation-wide audience studies continue to monitor audience propensity to participate in cultural activities. One of these, Shugoll Research's nationwide survey of theatregoers found that 29% of respondents will wait six months or more to return to the theater again.[3] Early results from WolfBrown's Audience Outlook Monitor of arts patrons' survey data from cohorts of arts organizations in Detroit, Atlanta, Cincinnati, and Los Angeles, and through networks of performing arts centers and university presenters across the U.S., show that only about 15-20% of arts attendees are willing to attend arts and cultural events when it is legally allowed, while 40-45% are ready to attend when the conditions permit, and another 20-30% are not ready to attend until the vaccine is available.[4] 69% of the respondents to the first wave of Culture & Community in a Time of Crisis survey of the US arts attendees and general public say they have done little or no planning for future art or cultural experiences.[5] When asked about the role of arts organizations in their communities, 96% of respondents to the same survey identified various ways that arts and culture organizations could help their communities during the COVID-19 crisis, but only 1 in 3 respondents indicate seeing these organizations helping in some specific way at present.

Organizations, it is anticipated, will increasingly need to rely on local attendees and domestic audiences as long-haul tourism is unlikely to pick up to pre-COVID-19 levels for the foreseeable future. A United Nations World Tourism Organization report found that tourism could drop 60 – 80% in 2020 after already causing a 22% fall in the first quarter of 2020.[6] Travel industry commentators suggest it may take some years for long haul tourism to return, against because the pandemics interaction with other trends – flight-shaming amongst affluent and socially aware user groups (among which cultural tourists number), as well as a turn toward outdoor destinations, and a rise in barriers to travel caused by the agenda of populist nationalism in many countries. It must be underscored that this is speculative – survey-based expressed propensities are currently quite volatile.

In a survey of arts organizations' leaders conducted for this review, the respondents mostly strongly agreed that the socio-economic and generational difference in propensity to participate, as well as a greater appetite for digital arts experiences, will affect their audiences' behavior in the long term. Some also pointed to the psychological differences in audience members where some would be more inclined to engage with arts at home where others, more extroverted individuals, may be eager to return to in-person social experiences and activities, with the competition for the public's leisure time likely to increase.

---

[3] Shugoll Research. *Coronavirus Theater Survey: National Sample of Theatregoers Quantitative Research Findings.* May 11, 2020.
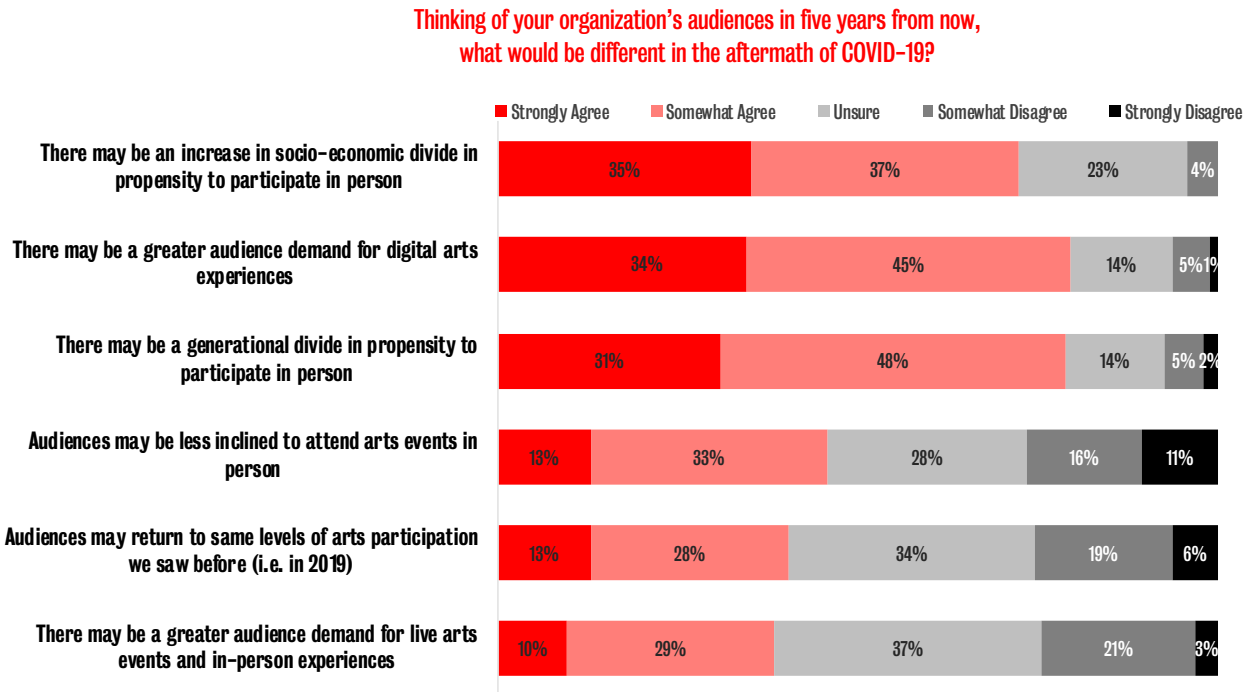
[4] Wolf Brown. *Audience Out Look Monitor – Preliminary Results.* June 13, 2020,

[5] LaPlaca Cohen & Slover Linett Audience Research, "Key Findings from Wave 1." *Culture & Community in a Time of Crisis* survey. July 7, 2020.

[6] United Nations World Tourism Organization. "International Tourist Numbers Could Fall 60-80% in 2020, UNWTO Reports." 7 May 2020.

Figure 1   Longer-term impacts of COVID-19 on audience behavior[7]

Thinking of your organization's audiences in five years from now,
what would be different in the aftermath of COVID-19?

Programming

Beyond the need to adjust programs to physical distancing measures – which for some means cancelling all onsite programs for the time being – there is not yet much clarity on the longer-term implications of the pandemic on future programming. In the near term, much of event-based programming is moving outdoors, being tailored for presenting to small groups, or is developed to be presented online. Museums and galleries are revising exhibition and display plans to accommodate safe physical distancing measures. Many museums have also cancelled exhibitions plans and interviewees in larger museums commented on the opportunity that the crisis has presented for 'rethinking' the model of large, expensive temporary exhibitions that have been used to drive attendance. The direct costs and environmental impact of these has been a matter of growing concern to the sector and they seem unlikely to be reinstated at least at the same scale and volume.

In the performing arts the development of live streaming and of digital capture in general has been growing in the years prior to the pandemic, with the specific potentialities of the medium being recognized increasingly. This has been given new urgency and increased institutional commitment and many producing and presenting organizations are thinking increasingly of a bifurcated programming offer – live and online – with overlapping but distinct audiences.

[7] Analysis of arts leaders' responses to the online survey fielded by AEA in May 2020.

The creative content distributed online by arts organizations has largely been made available for free. Some have encouraged donations and there are few examples of paid content distribution[8]. The challenge for the mid-term future may be in transitioning to monetization of such content. The observation has also been made that if equity of access is a goal, the medium obviously discriminates against those without regular access to internet.

The essential implication for the sector at large is the dramatic impact the pandemic is having on the creative community – artists, producers, performers. Supporting this creative ecology is becoming one of top priorities for some arts organizations. Similarly, forming strong and long-lasting partnerships with community, education and healthcare organizations is paramount for arts organizations to be able to deliver on their civic role. Others have felt that their role as civic anchors has to be subordinated to financial health. Where to strike the balance is a source of painful judgement and on considerable conflict within organizational leadership.

Income sources

In most scenarios, ticketing revenue will be affected by reduced levels of occupancy, especially at performing arts venues. For many arts organizations, the loss of earned income has not yet been compensated for by grants or donations. Emergency operating funding remains a priority for organizations with small, restricted, or non-existent endowments, especially those operating in the regions with lower income levels and fewer private donors. Organizations with a strong and loyal private donor base have had most success in securing emergency funding to sustain staff and continue some programming activity.

"We have big economic impacts to consider – contraction of the economy, reduction in discretionary spending. Seems likely that industry reform (perhaps greater collaboration) and government investment will be required." – interview with a representative of a performing arts center, June 2020

"If Foundations pulled support at the start of the crisis we won't be having this conversation. Being floated by them. Being small makes us nimble and agile and flexible so able to navigate as perhaps it becomes more difficult when dealing with fixed costs."– interview with a representative of a theatre company, June 2020

Many have focused on emergency fundraising and launched campaigns to attract individual donations in the weeks since the COVID-19 outbreak. Those donations are frequently redistributed to associate artists or kept as cash reserves. In some cases, raised funds go towards sustaining the permanent staff.

---

8 For an example of the vanguard of charging line theater, for example, see for example The Under Presents: Tempest https://www.nytimes.com/2020/07/08/theater/virtual-reality-the-tempest.html

Some organizations cite a decrease in giving from foundations that have redirected their effort towards immediate relief needs of their respective communities: food banks, prevention of domestic violence, welfare support, emergency housing, and, more recently, support for racial justice movement. In a report from CCS Fundraising on COVID's impact of fundraising for nonprofit organizations, 63% have seen a decline in fundraising since the pandemic began, and 80% expect that their fundraising results will continue to decline by the end of 2020.[9]

Organizations with endowments see them fluctuate and some have been particularly reluctant to tap into the endowment funds – even where unrestricted – to address the immediate impacts of the pandemic. Some institutions have been criticized for not using their endowments to lessen the blow of the pandemic to staff. MOMA, for example, has an endowment of over $1 billion but received widespread criticism for terminating the contracts off all of its freelance educational contractors.[10] On the other side of the spectrum is the LA Philharmonic that pulled $20.6 million (from a $281 million endowment) to help close a $80 million budget gap.[11] Many organizations have benefited from PPP funding under the CARES act, in either its first round, which came to an end at the end of June or September for the second round. The ending of the first round led to a round of redundancies, as maintaining employment levels during the program is a requirement for the commutation of the funding from loan to grant.

Over 60% of the arts leaders who responded to the survey fielded to inform this review project the operating models of their organizations to shrink, meaning a reduction in budget, smaller staff size, and changes in programming (as illustrated by the charts below).
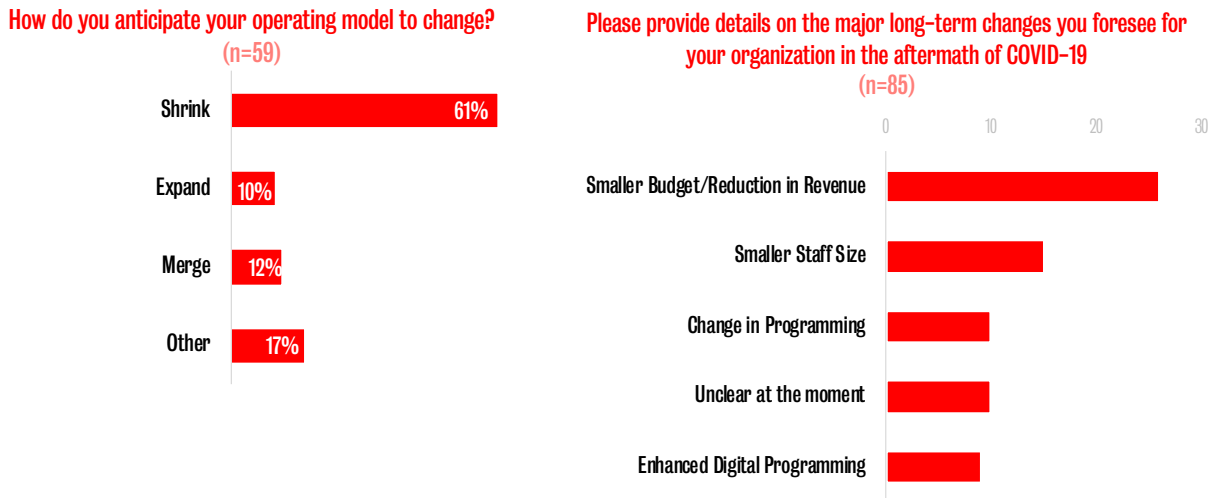
---

[9] CCS Fundraising. *Nonprofit Fundraising Survey: Fundraising Impact of COVID-19.* May 2020.

[10] Valentina Di Liscia. "Why Museums Can't Always Fall Back on Endowments." *Hyperallergic*, 15 April 2020.

[11] Jessica Gelt. "The Hollywood Bowl domino effect: Layoffs and furlough follow season cancellation." *LA Times.* 13 May 2020.

Figure 2   Impact on operating model[12]

How do you anticipate your operating model to change?
(n=59)

Shrink	61%
Expand	10%
Merge	12%
Other	17%

Please provide details on the major long-term changes you foresee for your organization in the aftermath of COVID-19
(n=85)

	0	10	20	30

- Smaller Budget/Reduction in Revenue
- Smaller Staff Size
- Change in Programming
- Unclear at the moment
- Enhanced Digital Programming

At the same time, they expect a reduction in earned income – except for the income streams related to profit from online retail and, in some instances, memberships and commercial income from food and beverage and retail operations. When asked about sources of contributed income, the majority (76%) expect the state government funding to decrease; 64% think the size of philanthropic grants would decrease; and over 50% expect the number of grants to go down as well. While nearly half of the respondents expect a decline in individual donations, nearly 30% think these would increase. This is echoed by some of the interviewees citing an uptick in giving from individual donors as an immediate response to the emergency fundraising campaigns and calls for donations.

---

[12] Analysis of arts leaders' responses to the online survey fielded by AEA in May 2020.

Figure 3   Anticipated impact on earned income streams

What would be different in your organization's earned income streams in five years from now due to the effects of COVID-19?

	Remain the same	Increase	Decrease
Online retail profits	46%	35%	18%
Level of memberships/subscriptions	28%	26%	46%
Ancillary profits from caf and/or catering	42%	14%	44%
General ticket sales	34%	12%	54%
Onsite retail profits	49%	6%	45%
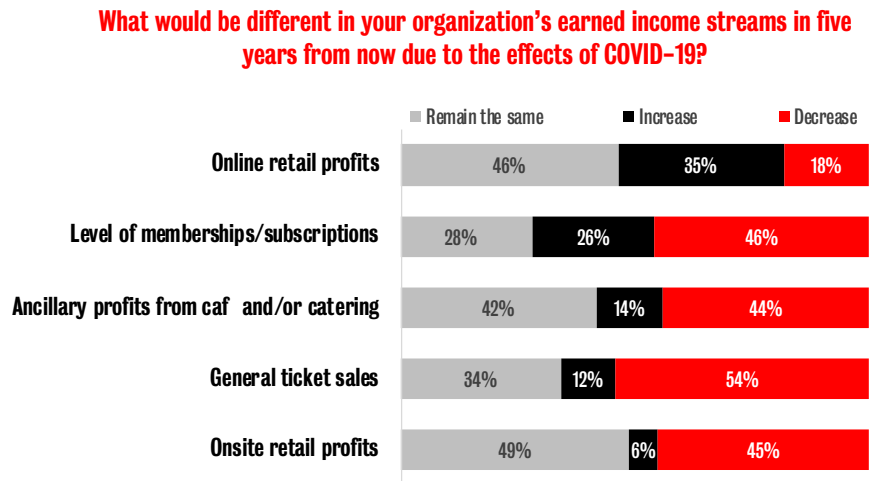
Figure 4   Anticipated impact on funding environment

What is likely to be different in your organization's funding environment in five years from now due to the effects of COVID-19?

	Remain the same	Increase	Decrease
Levels of federal, state, or local funding available	17%	7%	76%
Size of philanthropic grants available	25%	12%	63%
Number of philanthropic funders or grants available	26%	20%	54%
Levels of individual giving	26%	27%	47%
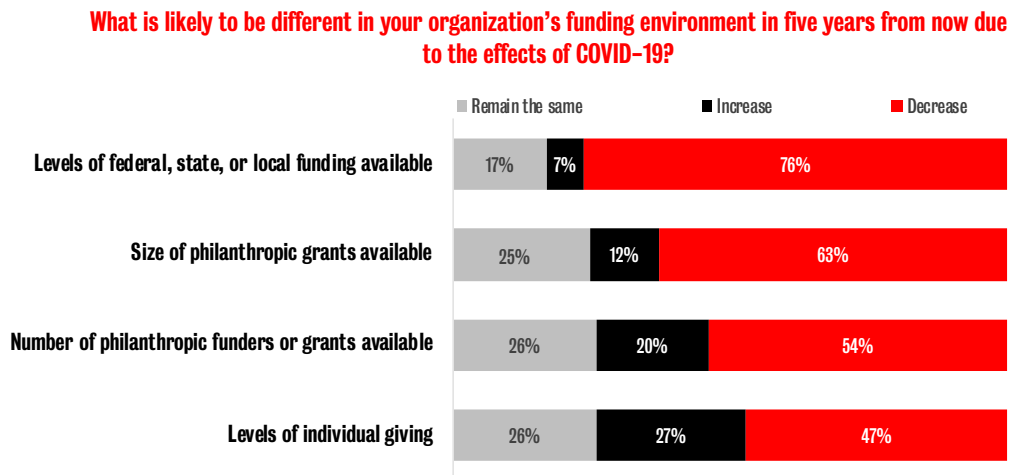
Structural inequality

One of the sector-wide trends discussed widely in the current pandemic and of the current debate around social justice and systemic racism instigated by the murder of George Floyd is the lack of cognitive, racial, socio-economic, and gender diversity among the sector leadership and workforce. There are no clear or universally institutionalized mechanisms of introducing plurality of voices into decision-making across the majority of "legacy" arts organizations (traditionally "white" art forms) and the increased pressure for concrete action and material progress – expressed in social media, in petitions and in staff forums – has caught many executive leaders off guard and – in some cases – created a source of tension with boards that may underestimate the depth of feeling the issue has generated in staff and therefore downplaying the urgency of the need to demonstrate action. This in turn is reinforcing calls for substantial review of the mechanisms for Board recruitment, skills, and accountability where the Boards are the ultimate decision-makers.

The financial pressures of the pandemic have disproportionately affected the front-of-house and hourly staff, contractors and artists. Similarly, many of the organizations serving BIPOC communities have disproportionately fewer financial reserves or access to building working capital and endowments. However, these organizations have much stronger links with and impact on their respective communities than their larger peers serving the white majority. As Zannie Voss and Jill Robinson's report (*In It for the Long Haul*, May 2020) argues, "culturally specific organizations are affected by the same structural racism and inequities that affect the people and communities they serve."

> *"Endowment is important for organizations of color and small organizations. We have a very small endowment because of who our board are. Endowments are both luxury and curse." – interview with a representative of a performing arts organization, June 2020*

Job security and wage disparities between leadership of larger arts organizations is inviting scrutiny in social media of these organizations' management and government structures to ensure adequate investment in administrative staff and creative workforce.

Wellbeing

The leaders of arts organizations universally expressed concern for the physical and psychological wellbeing of their staff and artists. Those pressures are higher for those on temporary or hourly contracts as there is little clarity if and when they may be able to return to work given the uncertainty surrounding the curve of this pandemic and the measures required to contain it. Current employment contracts often do not cover health insurance, particularly for staff in visitor-facing roles, which is creating greater health risks for those working in public facing roles.

> *"People of color and immigrant colleagues are feeling more pressure than ever, black women specifically." – interview with a representative of a multi-arts organization, June 2020*

Even the best poised arts organizations will need to reimagine as they respond to the long-lasting and largely still unknown economic, health, and psychological impacts this event will have on their staff and communities.[13] The Arts Centre Melbourne (Australia) has produced a series of publications on mental well-being for staff and artists that have been promulgated internationally.[14]

---

[13] Julia Halperin. "Three Museum Directors Offer a Behind-the-Scenes Look at How They Are Tackling the Challenge of Reopening Their Institutions Post-Lockdown." *Artnet.* 27 May 2020.

[14] See https://www.artswellbeingcollective.com.au/

2   Arts Sector Response: Strategies, Scenarios, Approaches

"Historically, pandemics have forced humans to break with the past and imagine their world anew. This one is no different. It is a portal, a gateway between one world and the next. We can choose to walk through it, dragging the carcasses of our prejudice and hatred, our avarice, our data banks and dead ideas, our dead rivers and smoky skies behind us. Or we can walk through lightly, with little luggage, ready to imagine another world."

– Arundhati Roy, April 2020

The place of planning

Arts organizations are reviewing their strategic plans and priorities in light of new scenarios as few accounted for a pandemic in previously developed plans and scenarios. For many this is the time of accumulating resources, funding, and ideas to ready for months to come and the potential phased reopening of onsite activities once there is more information available on the measures to contain current pandemic and future outbreaks. Much of this work involves detailed and intensive reworking of financial projections.

63% of surveyed arts leaders (*n=118*) are currently undertaking some form of self-defined forward planning; 15% have developed forecasts; 21% are not working on long-term forecasting but intend to; and 2% are not planning on developing long-term forecasts. The interviewees undertaking forward planning are primarily modeling for different phases or period of reopening and making corresponding financial modelling projects.

The financial scenarios being considered are modeling for reopening in fall 2020, winter 2021, spring 2021, summer 2021, or fall 2021, with many performing arts organizations not considering full reopening until after the virus is fully contained by widespread immunity or vaccination.

Overall, the arts leaders' main preoccupations in dealing with the effects of the pandemic lie with the uncertainty of the environment they need to plan for; optimization of their operations – in identifying efficiencies, blind spots, and securing resources; substantive expansion of digital content without compromising artistic quality or opportunity for audience engagement; management of organizational structure and staff; finding ways to establish and sustain effective partnerships, ensuring they continue to deliver on organizational missions. The civic movement for racial justice that followed the killing of George Floyd on May 25, 2020 has pushed the issues of equity, access, and the social role of arts organizations to the forefront of their agendas, where some have responded by intensified dialogue with their communities while others are still navigating towards finding their place in the racial justice movement.

When asked about specific operating areas that are likely to be impacted by COVID-19 in the long term, the arts leaders most frequently mentioned:
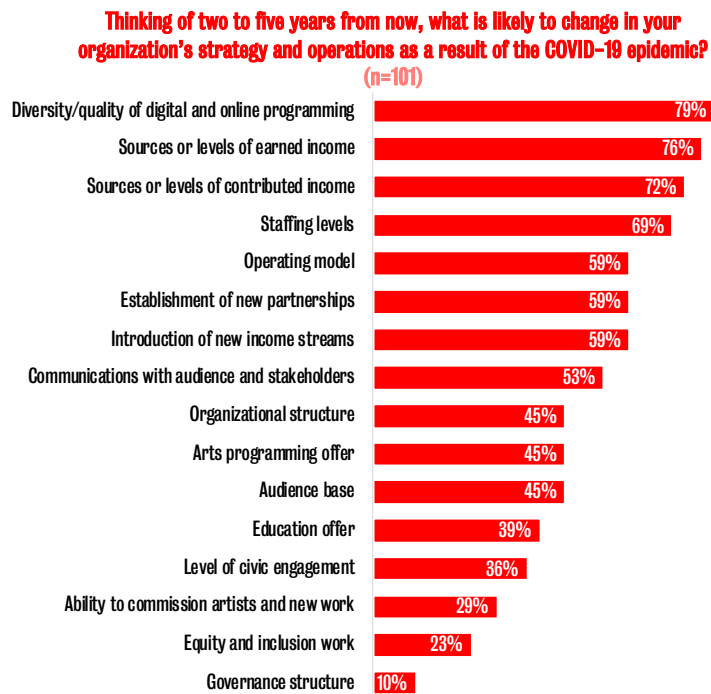
- changes to digital programming;

- changes in the levels of earned and contributed income;

- new approaches to audience engagement and communications; organizational and/or staff restructuring;

- and introduction of new partnerships and programs.

Figure 5   Anticipated key areas of operations to be affected by the impacts of COVID-19[15]

What changes do you anticipate would need to be made in your organization for it to adapt to and thrive as our sector and society faces the longer-term effects of COVID-19?

(by total number of mentions in open text responses, n=95)

Category	Value
Securing (new) funding & other resources / optimising costs	30
Expand digital programming	26
New ways of audience engagement	15
Organizational or staff restructure	13
Introducing new programs & partnerships	11
Managing public and staff safety	11
New uses of building / programming in other spaces	6

Figure 6   Anticipated changes to strategy and operations

Thinking of two to five years from now, what is likely to change in your organization's strategy and operations as a result of the COVID-19 epidemic?

(n=101)

Category	Percent
Diversity/quality of digital and online programming	79%
Sources or levels of earned income	76%
Sources or levels of contributed income	72%
Staffing levels	69%
Operating model	59%
Establishment of new partnerships	59%
Introduction of new income streams	59%
Communications with audience and stakeholders	53%
Organizational structure	45%
Arts programming offer	45%
Audience base	45%
Education offer	39%
Level of civic engagement	36%
Ability to commission artists and new work	29%
Equity and inclusion work	23%
Governance structure	10%

[15] Analysis of arts leaders' responses to the online survey fielded by AEA in May 2020.

Programming

In the near to medium future, the focus is on putting resources into artistic development, creating digital content, and exploring options for outdoor programming. This, in turn, may result in new production and presenting formats and creative collaborations in the long-term. Close collaboration with core audience and local community partners – either through preexisting partnerships or by establishing new ones – is almost universally seen as paramount to delivering arts programmes that are by, of, and for these communities.

To adhere to physical distancing and health safety measures, organizations are considering producing and presenting work for small audience groups and creating "experiences." For example, Opera Philadelphia is considering use of a large building in the city for an "exploration center" where it can bring together artists to develop new multi-genre that can then be presented to small audience groups and further distributed digitally. In Australia, Arts Centre Melbourne is looking into creating experiential offer for small audience groups with participative performances throughout the arts center's building, incorporating catering and commercial offer in the experience. FringeArt's Fringe Festival in Philadelphia has plans to open as scheduled on September 10 through October 4, 2020, with a combination of online, outside, and other methods of socially distanced performance. Fees for independent artists will be waived (minus the $20 application processing fee).[16] Across festivals and presenting performing arts organizations, much of the upcoming seasons' (2021 onwards) performance work is being redeveloped to be presented outdoors and to smaller audience groups.

Commissioning individual artists and public art works is another area of focus and some of these efforts are being self-organized by the artistic community. This encompasses a wide range of initiatives: from Drive By Art, an artist-organized public art exhibition, has had editions in South Fork, NY and Los Angeles, placing a number of works alongside the street so that people can experience art from the safety of their cars, to Staarsoper Stuttgart in Germany bringing together individual members of opera company and orchestra to perform for a single audience member in the city.

Producing new work digitally, engaging virtually via talks and discussions, and online distribution of previously recorded content is expected to continue in the long term as arts organizations are looking to embrace new ways of producing and presenting the arts digitally. These range from robot tours of museum galleries and comprehensive online catalogues of museum collections and exhibitions to developing materials for at-home arts participation (e.g. commissioning digital plays to be enjoyed at home) or monologues and ensemble productions reimagined for video conferencing platforms.[17] Some institutions have launched new collaborations to explore new 'hybrid' art form of creating dance, drama, or visual art productions digitally, with co-creators working remotely to produce digital work that blends and merges art forms with digital production and software tools.[18]

---

[16] Peter Crimmins. "Fringe Festival to Go On in the Fall—With Some Changes." *WHYY.* 30 May 2020.

[17] See, for example, www.playathome.org and other online programs from Public Theatre, https://publictheater.org.

[18] See, for example, A Miami City Ballet digital ballet, *A Dance for Heroes* https://www.miamicityballet.org/home/a-dance-for-heroes.

"Some programs could stay completely online; for some would do both physical and online. We repurposed a lot of staff to work on these new programs." – interview with a representative of an art museum, June 2020

Much of newly produced digital content is educational in nature and tailored to organizations' core audience groups as well as wider public. The National Museum of African American Music – a museum scheduled to open in Nashville on Labor Day Weekend 2020 – has transitioned its education programs from partner venues in the city to online platforms, increasing their footprint from local to national and global scale. While limited by physical venue capacity for in-person events and workshops (engaging about 2,900 audience members a year), the online programming started in April 2020 has by mid-June attracted over 40,000 viewers across multiple online platforms. Reflecting their onsite programming, London's Roundhouse "Round Your House" virtual program focuses on youth engagement, offering free access to Adobe Creative Cloud, tech support, guidance and skills development through online workshop/talk sessions, plus an online Songwriter's Circle, podcasts, and educational resources.

Figure 7   Digital content: demand levels and income generation strategies
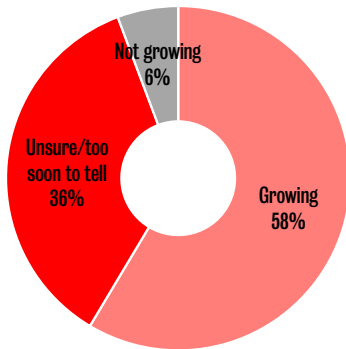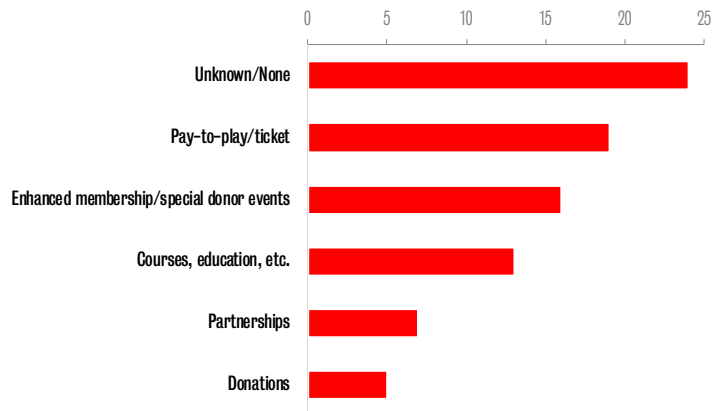
Arts and cultural organizations that had previously been strong in digital production and experimenting with new technologies are better equipped to pivot into the multi-platform model. A combination of physical and digital production and presentation may be the key to future arts experiences. The masters of participative theatre, UK/US-based Punchdrunk have to that end begun developing new projects in the formats of 'immersive TV drama' and interactive gaming & theatre experience.[19]

---

[19] Keza Macdonald. "Pokémon Go Creator joins Punchdrunk Theater for interactive venture." *The Guardian.* 30 June 2020.

The acceleration of virtual programming raises the possibility of "disintermediation." In other sectors, "middle-men" – property brokers, travel agents, publishers, record companies – have been subsumed by technological mediated relationships between producer and consumer. This possibility has not come to pass in the cultural sector where producing and presenting institutions, physically based, have retained a central and controlling role. However, the Chief Technology Officer at London's Serpentine Gallery has recently outlined a scenario in which technology companies, unencumbered by expensive physical infrastructure, and well-resourced, can enter and dominate the online cultural content sphere.[20]

Income Generation

Overall, arts leaders expect a greater reliance on contributed income over earned as for the majority of arts organizations earned income is directly linked to in-person attendance and onsite spending. However, new and alternative earned income opportunities are being considered in a shift to "multi-platform" model combining onsite and digital engagement. The recovery of commercial earned income – rentals, private events – is expected to happen sooner than the recovery of admissions-related income. Creation of strategic alliances that enable organizations to bring in new stakeholders is seen as one of the approaches to diversifying income streams. Otherwise, arts organizations are focusing on "relief & recovery" fundraising campaigns, encouraging donations for online programming, and facilitating support for artists.

To that end, the Museum of Contemporary Art in Detroit established an online marketplace for artists as part of its COVID-19 relief efforts. Partnering with the City Office of Arts, Culture, and Entertainment, the museum uses its Shopify e-tail platform to sell work by artists in the greater Detroit area. With shipping costs covered by the buyer, the total sale price is split between the artist and the museum, leaving both with some (modest) revenue.

A number of arts organizations are seeing generous donations in response to their online content. For instance, each event in a series of online community conversations ("Unmasked") organized by The Harvey B. Gantt Center for African-American Arts + Culture attracts 1,700-1,900 viewers on digital platforms (compared to 100-120 people for each panel discussion in the Center's physical space), and around 15% of viewers made donations while the Center did not expect to receive any donations for the series. In California, for the first time in 44 seasons, the San Diego Repertory Theatre released a recorded production for digital viewing. Its *House of Joy* opened March 11 and closed March 12; a dress rehearsal of the show was recorded March 4, and donations from $10 - $100 gave patrons access to the Vimeo recording until it expired on April 12. The potential audience growth that digital streaming allows versus depending on the local San Diego community is vast, but this pay-what-you-can model additionally allows the theater to discreetly open its content to viewers of different means. Museum of the African Diaspora in San Francisco raised $450,000 as part of an online auction of donated artworks, the equivalent of about 25% of the museum's annual revenue. Other organizations around the US are planning virtual galas to generate donations.

---

[20] https://news.artnet.com/opinion/future-art-ecosystems-1893666

As projections for in-person attendance and venue capacity remain unclear, arts organizations – particularly those in performing arts – are adjusting their subscription models and ticketing policies to adapt the "pay what you wish" and other ticketing models.

In lieu of government and institutional support, a number of mutual aid funds and other artist or staff-driven efforts have been launched to sustain artists during and in the aftermath of the pandemic. Mutual aid has grown in popularity in general throughout the pandemic, with fundraising and volunteering initiatives across communities. One such mutual aid fund is the Museum Workers Relief Fund, which has raised over $50,000 to distribute $500 grants to impacted workers who apply. The new TrickleUp NYC performing arts community fund awards artists grants of $10,000 to produce work whenever the fund reaches the $10,000 threshold. There is also the popular #artistsupportpledge initiative, which began in March 2020 and encourages artists to post their work for no more than the equivalent of £200, and when the artist reaches £1,000, they spend £200 on the work of a different artist.

While varied in their scale and entrepreneurial nature, none of the emerging initiatives so far are likely to address significantly the gap created by the loss of earned income following the stoppage to in-person admissions. The organizations previously highly reliant on contributed income and those with sufficient reserves and endowments funds are being able to weather the closure of their venues and in-person programming in the short term bit would be seeking increased philanthropic support should the caps on public gatherings, occupancy, and physical distancing measures continue in the long term.

Audience, visitor and community engagement

Overall, COVID-19 restrictions have forced a move from global to local in physical presentation (e.g. festivals, large-scale events) but from local to global in digital space (e.g. livestreams). As organizations consider their return to physical spaces, the ways of audience engagement they are thinking of are directly reflective of the programs, uses of buildings and facilities, and their response to the issues of racial justice, equity, diversity, access, and inclusion.

> *"The pandemic and BLM movement present a reckoning, an opportunity for many museums. How can we be more responsive to our communities, not just Boards and donors?" – interview with a representative of an art museum, June 2020*

Arts organizations (predominantly small and mid-size) created by and of people of color and minority groups are often well-embedded in their communities and are directly reflective of their communities' preoccupations and culture. For example, both Silk Road Rising theatre company in Chicago and Ballet Hispanico in NYC have been producing work with the artistic talent from the communities they serve, representative of these communities, but accessible to wider audiences, and plan to continue doing so. Similarly, the Museum of Contemporary African Diasporan Arts in Brooklyn, The Underground Museum in LA, and Brownbody figure skating and modern dance company based in the Twin Cities are rooted in African diasporic perspectives and experiences and representative of those in their creative output and the artistic talent they engage.[21]

Other small and mid-size organizations are having success where their engagement is authentic and built on long-term partnerships with local community organizations. For example, the ICA in Boston has had a multi-year partnership with East Boston community organizations and education institutions which it has continued during the pandemic by organizing a community food bank and is planning on taking into the future as such partnerships are at the core of the organization's mission and vision for their role in their city.

Larger arts organizations across the US have not had plausible progress in engaging with diverse audience groups and the pandemic has made the divide between participants and non-participants even wider.

Arts organizations have been seeking out ways to translate the in-person experience in the digital realm through a range of insightful talks, tours, short-form performances, educational workshops, and creative resources made available for at-home practice and learning. In Los Angeles, Petersen Automotive Museum has developed their online content, including transferring some of their in-person programming successful to the digital sphere. Their monthly "Cars and Coffee" drive-in event for audiences to gather in the museum's parking areas instead went global with a crowd-sourced video version of the event, which they compiled into a 90 minute YouTube Video of 20-30 second clips from viewers with 11,000 views and still held a "People's Choice" award to later be mailed to the winner. The Museum's YouTube channel overall saw an increase in viewership from 94,718 total views in March to 546,646 in April and a jump of subscribers from 940 to 8,850.

---

[21] For futher details, see https://www.ballethispanico.org; https://brownbody.org; https://mocada.org; https://theunderground-museum.org and https://www.silkroadrising.org.

New York's Frick Collection, appealing to a different audience, added a "Cocktails With a Curator" video series to its repertoire of digital programming. Every Friday, a curator hosts a 'happy hour' (rather, 20 minutes) discussing in detail a painting from the Frick's collection for up to 20 minutes; recordings are then added to their YouTube channel. The Frick's overall YouTube views have jumped 544% (over 306,000 views) in a month, with the average "Cocktails With a Curator" video receiving over 20,000 individual views. While the monetization possibilities of this platform are limited (between $921 - $14,7000 annually) the upswing in popularity and the popular format could represent a better educational programming arm for the Frick going forward, with the income going toward funding this arm of production. The viewership is international and the YouTube dialogue box suggests the emergence of a "community" that can be cultivated for membership and support.

Many individual artists and creative collectives are offering their work on a membership platform Patreon. The Neo-Futurists, a Chicago based theater group, attempts to put on 30 plays in 60 minutes, rotating plays in-and-out weekly. They've taken this format online using Patreon as their primary form of ticket selling for these weekly performances, offering access to new recorded shows for as low as $3 per week. As of July 12, 2020, they have 674 patrons yielding $2,868 per week ($11,472 per month). Nowadays, a Brooklyn bar and club, offers access to their archive and current rotation of DJ livestreams, among other perks, for a Patreon subscription starting at $5 month. As of July 12, 2020, they have 1,643 patrons (minimum estimate of $9,315 per month). Although this is a for-profit music venue, the success they have found cultivating their audience highlights the power that strong community presence has in translating to monetization.

Working with artists

Providing work for artists and producers through commissioning, presenting, collaboration, and other opportunities is paramount to support the core of the arts sector ecosystem, while many funders moved to supporting larger pool of artists and are collaborating in offering emergency funding. Baltimore Museum of Art is using $100,000 from their former speaker fund to pay for new BMA Salon, BMA Screening Room, and BMA Studio initiatives to provide paid work and exhibition opportunities for galleries, artists, and collectives. BMA Studio also provides art-making kits alongside meal-delivery with the Greenmount West Community Center to give artistic opportunities to families without digital access. The Movement Theater Company launched the 1MOVE: DES19NED BY…, an extension of their 1MOVE program that allows artists to respond to immediate issues in a digital space. The extension commissioned 15 designers to create new work. The Philbrook Museum in collaboration with the Oklahoma Visual Arts Coalition established an artist marketplace where artists receive 100% of proceeds.

"We will see a reduction in international touring as artists may opt to stay closer to home, this provides an opportunity for local artists to be seen more on our stages as we move to create local content to cater for our audiences." – interview with a representative of a performing arts center, June 2020

Artist-led, intimate, grassroots, and mutual aid initiatives are likely to continue to flourish and some arts organisations are engaging with their creative collaborators and artistic community to build new initiatives and programmatic partnerships to support small-scale work.

Restructuring and upskilling

"We have to show up in a new way, reinforcing with the team the notion of thinking as a digital and multiplatform arts organization for the foreseeable future while delivering the mission." – interview with a representative of a multi-arts organization, June 2020

Arts organizations are considering transition and merger of staff roles as some are becoming obsolete and new skills are coming to the forefront. These specifically apply to the need for digital production and distribution expertise and data analysis; legal expertise; and refocusing from onsite programing and visitor services to digital. At the same time, this pandemic forced larger arts organizations to work more interdepartmentally and collaboratively, and they are looking to take this new cross-departmental approach into the future.

During the lockdown period, some organizations managed to avoid layoffs by reevaluating staff skills and putting staff members on new projects during lockdown (e.g. at Blanton Museum of Art and Gantt Center where staff – particularly younger members of staff – have taken on digital projects). Others have formed cross-departmental alliances and working groups to address priority operating areas and pivot into the new reality.

Nonprofit staffers appear to have been at greater rates as staff navigate their ongoing security and, in many instances, deals around furloughs and layoffs[22] – in the last year, membership at the Nonprofit Professional Employees Union grew 30%.[23] Museum boards and senior level staff may need to reconfigure their approach to management based on greater staff dissatisfaction, dependence of front-of-house staff on handling the most exposed parts of re-opening organizations, and fear of instability in any future pandemics. On the other hand, arts organizations are finding it increasingly difficult to deal with the centralized inflexible structure and processes enforced by some unions preventing them from timely transition to new operating models, e.g. presenting work digitally. In an attempt to reconcile with presenting the work virtually, the Actor's Equity Union put special streaming agreements in place that allow theaters to charge patrons a ticket price for one-time viewing of a performance, which allows the work to be seen and actors to be compensated but attempts to curb the time period of digital content being available online.

---

[22] Andrew Wallender. "Nonprofit Workers Turn to Unions During Pandemic Uncertainty." *Bloomberg Law.* 11 May 2020.

[23] Eliza Berkon. "The Pandemic Is Inspiring a Wave of Unionization Efforts. Will It Lead to Greater Protections?" *WAMU.* 13 May 2020.

Institutions are needing to increasingly grapple with their staff demands for transparency and stability, addressing how they might adopt or reject less hierarchical models of management. For example, in May, staff at SFMOMA called on its board and leaders to re-examine their existing strategic plan and approach to restructuring by considering the staff proposition of sharing work and decreasing salaries accordingly as to not fully lay off or furlough anyone.[24] Their petition and claims were rejected, and the museum laid off an addition 55 staff members in June.[25] Similar stories have happened throughout the country, including at the Minneapolis Institute of the Arts after a similar petition.[26] In an effort to maintain their teams, many arts organizations (e.g. Woolly Mammoth Theatre Company in D.C. and Roundhouse in London) have senior staff members taking salary cuts to redistribute the funds to other members of the team and minimize elimination of staff roles in their organizations.

Furthermore, as a result of the socio-economic impact of the pandemic, a proportion of arts organizations report on changes in their leadership with Board members and/or senior leaders of the organizations resigning or planning to transition into different roles and sectors due to the pressures caused by the pandemic. While this may offer an opportunity to diversify leadership styles and skills, it also presents a challenge where some arts leaders are concerned with the "bran drain" from the sector and loss of institutional knowledge.

Working towards More Equitable Sector

> *"Declutter, decolonize, declass... Create an environment that listens hard and acts as quickly as it is possible. Create non-alienating space". –*
> *Kwame Kwei-Armah, Artistic Director, Young Vic (London)*
> *in a webinar conversation with Andrew Recinos, President, Tessitura Network, June 16, 2020*

Arts organizations with the legacy of less diverse audiences are making plans, commitments, and, in some instances, organizational and tactical changes to become more representative of the population in their immediate environments and wider society. This involves reshaping the leadership roles and diversity of those occupying those roles, the creative talent being engaged by and presented by arts organizations and venues and translates into the audiences those organizations and venues manage to attract.

---

[24] Valentina Di Liscia. "Furloughed SFMOMA Staff Ask Director to Draw Salary of Zero to Retain Workers." *Hyperallergic.* 24 April 2020.

[25] Eileen Kinsella. "SFMOMA Lays Off an Additional 55 Staff Members as Museums Prepare for a Reckoning Heading Into a New Fiscal Year." *Artnet.* 8 June 2020.

[26] Alicia Eler. "Minneapolis Institute of Arts cuts staff in response to pandemic." *StarTribune.* 23 June 2020.

A number of organizations we researched and consulted are hiring or plan to hire consultants to help them navigate work with respect to racial equity. Others are undertaking self-assessment by having intentional team conversations with Boards. At Baltimore Center Stage, the leadership team is set to examine how racism and white privilege show up within the organization and in its program. They have begun by acknowledging the need to develop organization culture that is responsive, safe, and connected to socio-political environment.[27]

Some organizations have been focusing on their role in helping ease the racial and socio-economic disparities amplified by the pandemic. This role comes more naturally to organizations run by / of / for people of color and minority communities. In this work, they are managing to create new platforms for discussion, lobbying for support towards underrepresented and underserved groups of artists and audiences, and possibly create greater transparency in the sector. For example, online discussion series organized by the Harvey B. Gantt Center for African-American Arts + Culture ("Unmasked") has attracted viewers not just from the local area but nationally and globally, while Juxtaposition Arts (JXTA) in Minneapolis, Minnesota, has partially reopened on Jun1 15th, 2020, to continue offering young adults classes in arts, printmaking, and tactical urbanism, all with social activism focus.

Physical infrastructure

Organizations with no venues – and associated fixed costs – have more flexibility to adapt and change their business models in the current environment, an ironic situation given a generation of substantial investment in highly specified physical infrastructure. Those with buildings or in pursuit of capital projects are considering new ways to utilize cultural infrastructure that may never return to pre-COVID-19 occupancy rates. This may generate new models of civic and community uses; retail; food and beverage; education uses; special events (e.g. virtual fundraising events for other non-profits); as well as conversion to smart and digital buildings.[28]

Some are contemplating the most relevant uses of their physical infrastructure moving forward. For example, the Museum of Contemporary African Diasporan Arts in Brooklyn that is due to relocate into a new bigger space in 2021, is engaging in conversations with their artists and community in establishing the ways the new spaces can best serve them – as an artistic incubator and community center and support tackling some of the immediate issues in the community (e.g. partnering with farmers on a food distribution center). Others are considering adapting the space for more intimate events and livestream/broadcast activity. For example, the Asian Art Museum in San Francisco is investing into equipment to allow for live streaming and inviting programmatic partners to use the space as a venue and the program to be live streamed or recorded/edited and presented at a later date, using the museum as a performance venue without an audience.

---

[27] Source: CI to Eye livestream with Stephanie Ybarra, Artistic Director, Baltimore Center Stage, June 25, 2020.

[28] Charcoalblue. *Performance Buildings in a Post-Pandemic World.* March 2020; AEA interviews.

Others are thinking of introducing ongoing measures for the long term uses of the buildings: introducing touchless transactions and equipment throughout the building; redesign and retrofitting of venues; accommodating artist residencies / creative labs; expanding or introducing small-group and one-on-one learning spaces. Equally, going beyond their own walls and programming in outdoor spaces and utilizing infrastructure elsewhere to develop and present artistic work is a step many are looking to take to both continue artistic production and engaging with local communities, i.e. taking the work to them rather than expecting them to come to a venue.

As infrastructure repurposing proposals emerge to find new uses for underused or defunct commercial and office property, similar developments may be adapted in the cultural sector.[29] These could involve creating work, training, and rehearsal spaces for artists; maker spaces; and other cultural production facilities.

Lobbying and collaboration

With state, municipal, and philanthropic funding already in decline across many regions and for many individual arts organizations, the sector is voicing a concern for being siloed into a 'low priority' category in the recovery measures and funding. For example, in Philadelphia proposed budget cuts for arts include the elimination of the $4.4 million Office of Arts, Culture, and the Creative Economy and the end of the Philadelphia Cultural Fund program, which annually distributes around $3 million in grants. These emerged after the Governor rescinded the state-given grants for the rest of the year. Many of the city's cultural leaders have been outspoken about these proposed cuts, with the Greater Philadelphia Cultural Alliance increasing its advocacy work, a multi-organization led petition has been circulated, and individual leaders are also acting as lobbyists against these measures.

Policy measures look increasingly important in states that have excluded nonprofits from their relief funding measures. In Wyoming, for example, all forms of nonprofits were excluded from applying to the Wyoming Business Council's initial round of $50 million of business relief, leaving organizations like Casper's Nicolaysen Art Museum without opportunity to receive aid. The exclusion was a result of many nonprofits being viewed as "lobbying or political" organizations, and instead of examining the nuances of the sector more closely to exclude only those explicitly political groups, the first round missed all of these organizations. While the next funding is being opened to 501c3s and 501c19s after pushback from nonprofits, time is of the essence for many organizations and any funding could come too late for them.

In Los Angeles, the City Council voted to approve the reallocation of funds from the Private Arts Development Fee Program, which collects money from property developers of projects valued $500,000 or more to pay an arts fee based on the building size or 1% of the project's Building and Safety permit. 147 arts organizations across LA signed a letter supporting the original motion by Councilman David Ryu to divert these funds, which typically support city events, toward grants for artists, arts organizations, and live performance spaces.

---

[29] Patrick Sisson. "The Dying Mall's New Lease on Life: Apartments." *Bloomberg City Lab*. 30 June 2020.

The Actors Equity Union turned its attention on the Broadway League to secure benefits for newly unemployed Equity members. With secured deals, Equity and other related unions of stagehands or other theater works banded together to call upon New York State and City to include the theater industry in its future budgeting.

National Independent Venue Association has issued a call to action for the members of public and creative community to write to legislators to lobby for federal assistance to support independent venues. In performing arts, a new coalition of independent producers – the Creative and Independent Producer Alliance (CIPA) – has been formed as a peer support alliance to "support and sustain the work of independent creative producers and the artists and projects they produce by creating visibility and community, identifying and dispersing resources, and providing tools and advocacy for building a sustainable practice in the contemporary performance sector."

"We are raising funds together with a consortium of other small organizations – this is opening doors to foundations that we haven't been able to apply to before." – interview with a representative of an art museum, June 2020

"Performing arts is an industry that has collaboration at its heart. We will get through this together and with our approach to solving problems, which is to be creative and to collaborate." – interview with a representative of a performing arts center, June 2020

Currently, many arts leaders are in regular communications with their peers regionally and nationally comparing notes on the response to the pandemic, developing approaches to reopening, and forming alliances to lobby the policymakers. Many hope to continue to operate in closer collaboration with their peers in the future. Such collaborations would include sharing programming and producing expertise and resources; digital collaborations; back-of-house infrastructure and skills sharing. One examples of such collaboration work are the conversation BRIC is having with neighbor arts organizations in Brooklyn to support them with digital production and broadcast activities – an area where BRIC can offer its expertise to arts organizations with lesser experience in the same realm.

While there has been some discussion around resource and back-office facilities sharing among groups and partnerships of organizations, we have not observed much evidence of such collaboration yet. One manifestation of a collaboration to share costs and resources has been a collaborative crowdfunding campaign by The Colored Girls Museum (TCGM) and The Paul Robeson House & Museum (PRHM) I Philadelphia who have raised over $105,000 to source required cleaning services, renovations, and personal protection equipment as they prepare the buildings for reopening.

Neither have we yet observed new partnerships between larger and more well-resourced arts organizations and smaller and community arts organizations that could benefit from access and support to infrastructure and other resources.
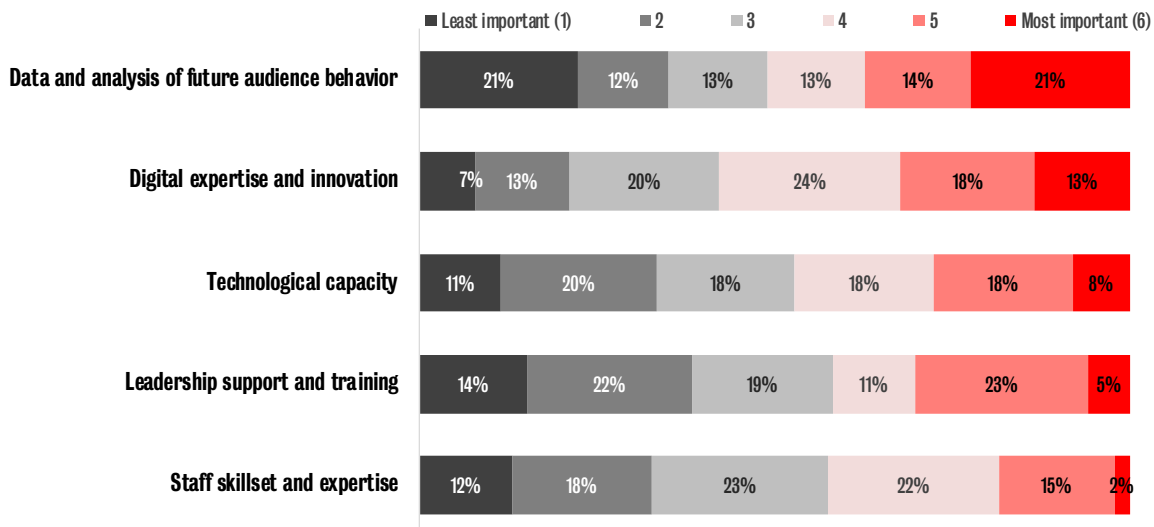
3 Identified Needs and Priorities

"We know what we are, but know not what we may be."
— William Shakespeare, Hamlet: Act 4 Scene 5

As arts organizations contemplate reopening of their physical operations and reimagining the virtual ones, and strategize new approaches to programming and income generation, a number of resource, knowledge, and skill gaps have been identified that need to be addressed to support the transition into a new reality.

When asked what resources they most need, the online survey respondents identified data and analysis of audience behavior, leadership support and training, and digital expertise as the top priority areas, as well as general business planning expertise to develop business models for the future. Capacity building and business modelling skills were also identified as priorities for personal development of arts sector leaders who responded to the survey.

Figure 8   Organizational and personal needs in managing the response to COVID-19 implications

What skills, non-financial resources and data do you feel a lack of most acutely in responding to the impacts of the COVID-19 situation within your organization?

	Least important (1)	2	3	4	5	Most important (6)
Data and analysis of future audience behavior	21%	12%	13%	13%	14%	21%
Digital expertise and innovation	7%	13%	20%	24%	18%	13%
Technological capacity	11%	20%	18%	18%	18%	8%
Leadership support and training	14%	22%	19%	11%	23%	5%
Staff skillset and expertise	12%	18%	23%	22%	15%	2%

What skills, non-financial resources and data do you feel a lack of most acutely in responding to the impacts of the COVID-19 situation personally?

Legend: ■ Least important (1) ■ 2 ■ 3 ■ 4 ■ Most important (5)

	Least important (1)	2	3	4	Most important (5)
Business modelling skills	15%	15%	28%	22%	14%
Access to scenario planning resources	12%	23%	23%	24%	13%
Access to capacity building programs	10%	23%	25%	25%	11%
Digital skills and expertise	17%	27%	16%	23%	11%
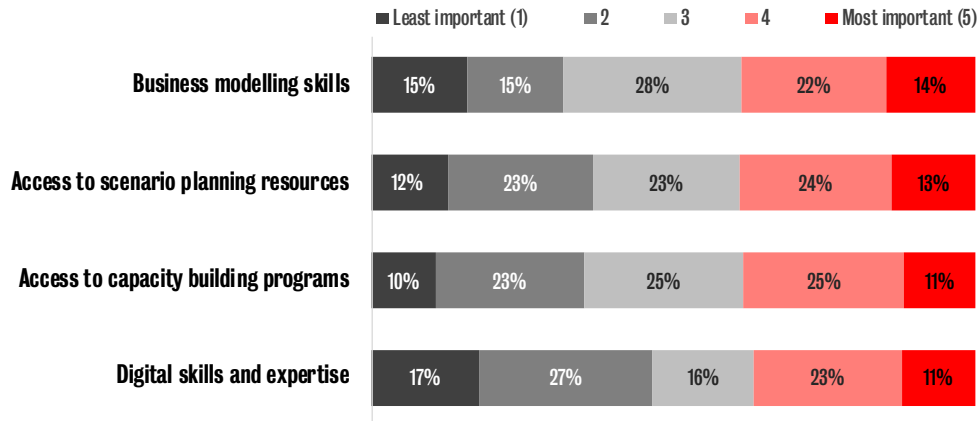
Figure 9   What can philanthropic community do to help navigate the impacts of COVID-19? (n=80)

Provide general operational support (rather than project grants)	28%
Multi-year grants and the ability to look ahead	25%
Looser guidelines on reporting and what funding can be used for	14%
Support with infrastructure and health&safety measures	9%
Skill-sharing and parternship opportunities	9%
Advocacy	9%
Support digital initiatives	8%
Increased funding for artist commissions and experimental programming	8%

Operational Funding

Perhaps unsurprisingly, organizations consulted in the course of this review, and the mounting evidence from media sources, most often express the need for short- and mid-term operating funding. This funding is required to support staff and core activities and to acquire equipment required for reopening with physical distancing and health checks measures.

"As institutions are required to be more fluid the funders and systems around them need to be more fluid too."– interview with a representative of an art museum, June 2020

"We need support to trial big ideas before taking them to a broader base of supporters."– representative of a performing arts center, June 2020

"Foundations could simplify application processes, especially for independent operators/small organizations, so that they do not carry a heavy admin burden chasing an ever-diminishing pool of support." – representative of a performing arts center, June 2020

"Grantmaking is hierarchical and not similar to ways of operating in black communities." – representative of a performing arts company, June 2020

Arts organizations in receipt of philanthropic funding and those seeking grants from foundations point to the need for general operating support rather than having to adhere to funding requirements earmarked for certain types of programmes. The arts organizations' representatives also point to administrative and processual requirements of grantmaking and application process that make the very process of raising funds a heavy burden on their capacity (especially for smaller organizations) and prevent them from securing funding when not meeting the eligibility requirements (such as budget or staff size).

Data

Continuous sector-wide collection and analysis of audience data and sentiments, with the results being made available to those working in the sector, is seen as one of the crucial steps towards better understanding of the future audience behavior, as well as allowing for greater transparency of current trends. Projections of audience behavior for individual arts organizations and the arts sector as a whole are needed to inform programming and operating decisions. While efforts have been made to gather such data before and during the outbreak of COVID-19, an important step is the consolidation of such data for improved analysis and projections – both across the sector and within organizations (e.g. by consolidating of donor, fundraising prospects, online audience, and ticket buyers data).

"There is not enough data to understand what is going to happen so we are surrounded by uncertainty."
– interview with a representative of an art museum, June 2020

Digital and Technology

Support is sought for the exploration of the future of digital in the arts to truly move away from the 19th century presentation model. As the visual and performing arts organizations and producers are considering producing work for digital platforms, there is a need for investment in research & development that would allow artists to collaborate with experts in software, technology, and digital production to produce work that is 'digitally native' and of high artistic caliber. This involves deeper engagement with experts from the fields of broadcasting, software development (including AI), digital production (including VR and AR production) and distribution.

"The move to digital a huge shift for the arts sector. Would use technology to enhance and expand footprint and impact. Knew it but weren't playing with it. Able to send educational elements to far corner of the world - that is remarkable. Need to learn how to capture that and continue utilizing it as tool and not a crutch. And then how to draw people from screen to stage." – interview with a representative of a performing arts organization, June 2020

Reflective of the need for an improved and continuous data collection, organizations are seeking support for implementation of organization-wide CRMs to collect and analyze visitor, donor, and digital engagement data in one single software platform universally accessible across departments and teams. Front-of-house technology and software is required for implementation of public health and safety measures onsite, including visitor flow monitoring and management. Many organizations are also looking to invest into technology allowing for greater universal accessibility of content to make it available to audiences of different abilities and ages.

Planning Expertise

Many of consulted arts organizations' leaders are looking to develop business planning skills for leadership and Boards (including but not limited to crisis management) and build knowledge about alternative business models. Many would benefit from access to scenario planning resources and practical expertise in functional mergers and acquisitions.

Leadership Accountability and Diversification

Diversifying Board expertise and improving Board members accountability is a priority to help ensure the decision-making within arts organizations is guided by a diverse range of experiences and perspectives. In some instances, Board members are seen as burdensome on their organizations as they may carry perspectives from corporate and elite backgrounds not applicable to the missions and communities of their organizations. Grantmaking process where Board training, accountability, and diversity is a clear requirement with measurable outcomes is therefore encouraged by executive leaders and teams of arts organizations.

As part of that, a clear standard for Board and senior leadership accountability is desirable for the not-for-profit arts sector to move forward in the direction of greater transparency and inclusion.

Staff Support and Upskilling

In the immediate aftermath of COVID-19 closures, arts organizations were in need of legal expertise to navigate complexities of staff layoffs, furloughs, and state and federal funding programs and requirements.

Upskilling, restructuring and retraining staff to address new programming and operating priorities (e.g. digital production, distribution, data analysis, community engagement) is at the forefront of many organizations' planning for mid- and long-term operations.

Organizations are also exploring the measures they can take to support their staff wellbeing, and help the work-life balance as working from home is becoming a new norm for many. Where redundancies had to be made or are expected, the organizations' leadership are preoccupied with their capacity to find and attract new talent and are seeking ways to mitigate the potential loss of institutional knowledge.

The organizations are finding themselves in need of fiscal and financial modeling expertise as they need to develop more minute and multi-scenario financial models and budgets for the coming seasons and years.

The other important area for upskilling and acquiring expertise (including introducing new staff roles) is data analytics and improving continuous collection and analysis of audience data.

Most organizations are also finding themselves in need of accelerated upskilling of their digital production and distribution capacities: from creating content, to producing interactive educational content, to working with third party content distribution platforms and services and dealing with IP issues associated with producing and distributing content online.

"We need computer geeks / tech staff who understand digital production, people who are adept to gaming software." – interview with a representative of a theatre company, June 2020

Partnerships

50% of the respondents to online survey conducted for this review are pursuing partnerships with other sectors that include other cultural organisations; education providers, including universities; digital content platforms and providers; hospitals and the healthcare sector; media, TV, and film sectors. As they navigate these partnerships, expertise in planning, delivering, and evaluating collaboration and partnership work is required for the best possible outcomes for the partner organizations and their beneficiaries.

"There will be a renewed focus on our civic and community role and we will need to play a much more active role in enabling art to be created, this may take the form of a public/private partnership with our local state government or creative agencies and artists as more traditional methods of funding and philanthropic support may be channeled to other more important perceived needs e.g. health or education" – interview with a representative of a performing arts center, June 2020

"It's a good time to explore collaborations with sporting events as well as hospitality" – interview with a representative of a performing arts center, June 2020

Alternative Organizational Models

Arts organizations are willing to experiment with the organizational forms that are alternative to the 501c3 not-for-profit structure prevalent in the sector. Some encourage funders to embrace non-traditional models through fiscal sponsorship. These may take the form of a low-profit limited liability company designed for for-profit companies with social benefit, social enterprises, and other organizational forms. A pilot cohort of such alternative organizational models could spearhead a transition to a more efficient and flexible operating model for arts institutions.

"Our sector needs to be dealing with variables within the industry and business practices that are busted. Performing arts business models are busted." – interview with a representative of a performing arts organization, June 2020

"Funders in the arts are not investing in working capital and liquidity. Nothing is going to change if that's not the focus. Venture capitalists in other sectors invest in teams who then innovate. All arts organizations have is access to philanthropy who are very risk averse." – interview with a representative of a performing arts organization, June 2020

"We need new organizational form and tax model for music presenting venues - would love to participate in some sort of 'think tank' for that." – interview with a representative of music venue, June 2020

Appendix 1: Methodology

The evidence review was informed by a desk research and analysis of grey literature conducted by AEA from February 2020 through the end of June 2020. It was greatly enriched by interviews with the leaders and experts from the arts sector and a further survey of 118 arts organizations representatives to whom we are very grateful for their insights. For a full list of interviewees see Appendix 2 below.

Desk Research

AEA has been monitoring analysis and data made available in the media, on industry forums, and through webinars and podcasts. While the full inventory of news items, analytical reports, and opinion pieces counts beyond 500 pieces, we have listed resources particularly relevant to this review in Appendix 3.

Interviews

The initial round of 16 interviews centered around general cultural leaders and thinkers, many of whom formerly ran arts organizations and continue to be deeply engaged with the sector.

The following round of 28 interviews focused on interviewees representing individual arts organizations from a range of locations, organization types and sizes, and art forms.

Online Survey

The survey was completed by 118 arts professionals from the US, UK, Australia, Canada, Greece, and the Netherlands. Most respondents are the executive leaders or staff members of arts organizations representing a balanced mixed of visual and performance art forms and organizational sizes, as illustrated by the charts below.

Figure 10 **Survey respondents by affiliation in the arts sector** (n=118)
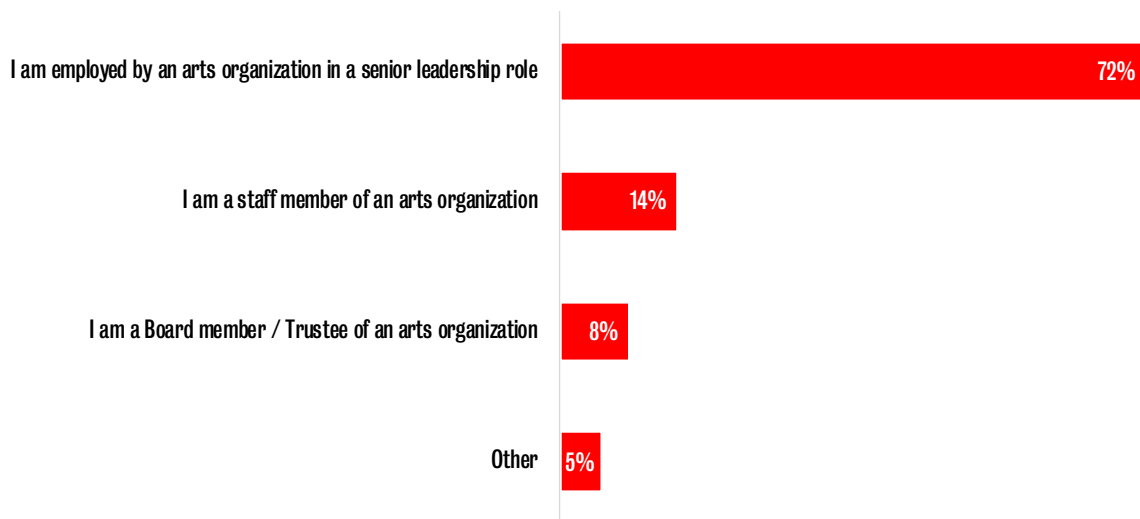
Affiliation	Percentage
I am employed by an arts organization in a senior leadership role	72%
I am a staff member of an arts organization	14%
I am a Board member / Trustee of an arts organization	8%
Other	5%

Figure 11   Survey respondents by primary art form of their organization (n=118)

What is the primary art form of the arts organization you represent?

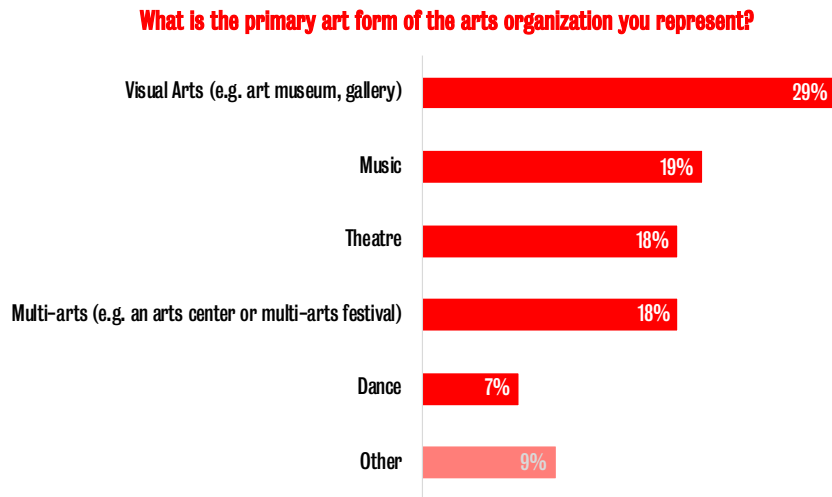| Art Form	%
Visual Arts (e.g. art museum, gallery)	29%
Music	19%
Theatre	18%
Multi-arts (e.g. an arts center or multi-arts festival)	18%
Dance	7%
Other	9%

Figure 12   Survey respondents by location of their organization (n=118)

USA 79%

UK 12%

Australia 5%
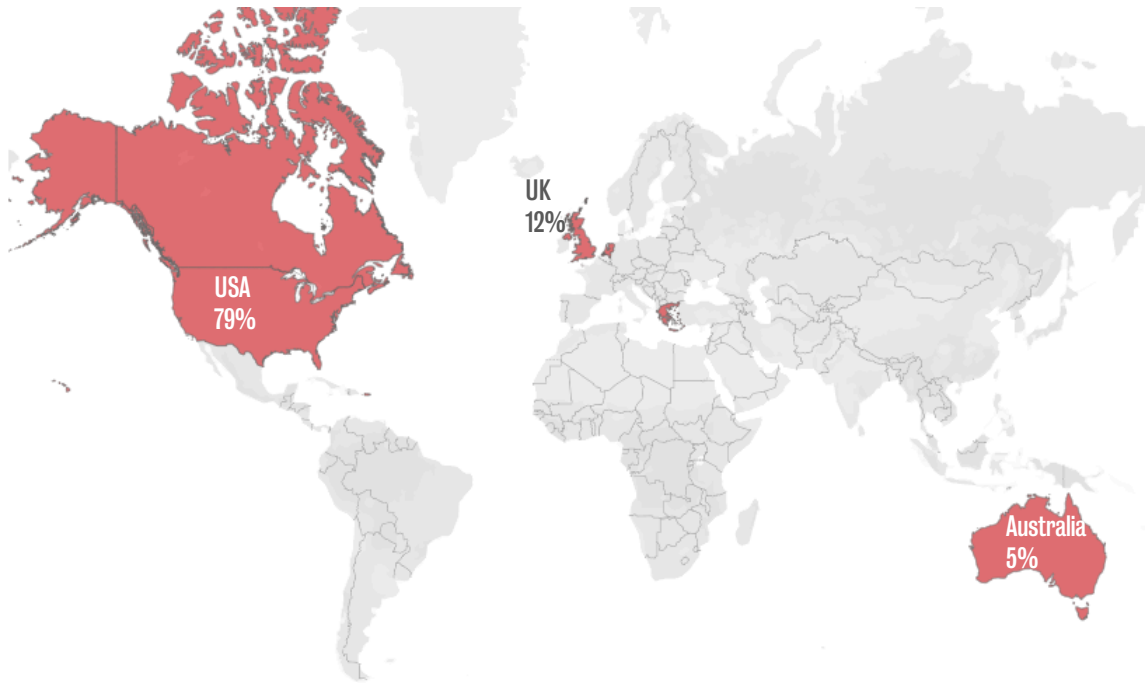
Figure 13   US-based survey respondents by state (n=93)
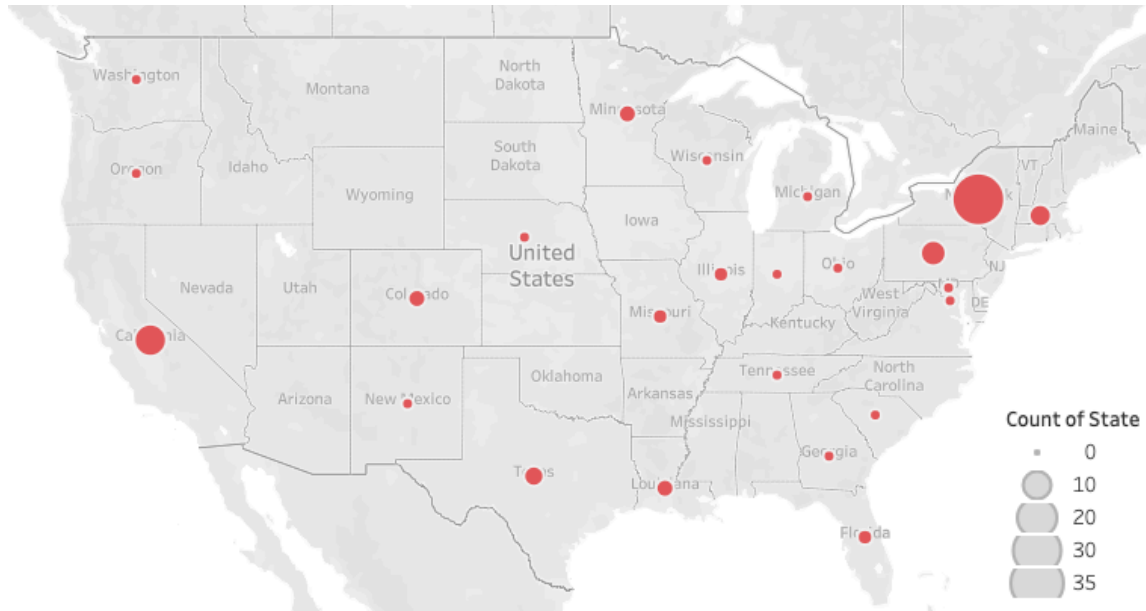
Figure 14   Survey respondents by total annual operating budget ('size') of their organization (n=118)
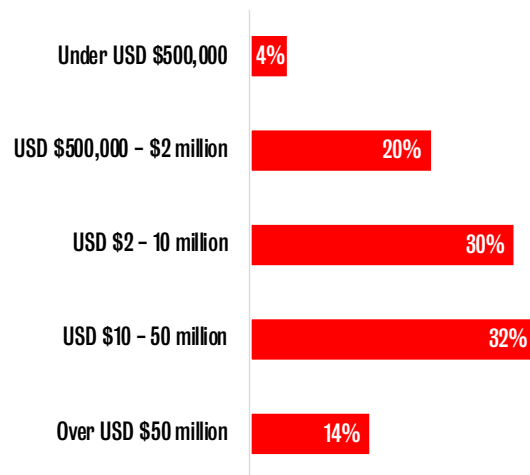
Appendix 2: Interviewees

Interviewees: "Informants"

Name	Surname	Arts Sector Affiliation	Country
Franky	Airey	Director and Founder, Philanthropy Squared	Australia
Karen	Brooks Hopkins	President Emerita, Brooklyn Academy of Music; Senior Advisor, Onassis USA	USA
Alan	Brown	Principal, WolfBrown	USA
Laura	Callanan	Founding Partner, Upstart Co-Lab	USA
Ben	Cameron	Philanthropic & Arts Sector Expert	USA
Gale	Crider	President and CEO, National Arts Strategies	USA
Geoffrey	Crossick	Distinguished Professor of Humanities, School of Advanced Study, University of London	UK
Anna	Jobson	Director of Change, University of the Arts London	UK
Peter	Linett	President, Slover Linett Audience Research	USA
Tonya	Nelson	Director of Arts Technology and Innovation, Arts Council England	UK
Diana	Ragsdale	Assistant Professor & Program Director, Arts Management & Entrepreneurship MA, The New School	USA
Brent	Reidy	Senior Director, Digital Research, The New York Public Library	USA
Sanjoy	Roy	Managing Director, Teamwork Arts	India
Nina	Simon	Spacemaker and CEO, OF/BY/FOR ALL	USA
Andrew	Taylor	Associate Professor and Department Chair, Performing Arts, American University	USA
Laura	Zucker	Senior Fellow, Arts Management Program, Claremont Graduate University	USA

Interviewees: Arts Organizations Representatives

Name	Surname	Job Title	Organization	City	Country
Emika	Abe	Managing Director	Woolly Mammoth Theatre	Washington D.C.	USA
Amy	Andrieux	Director / Chief Curator	Museum of Contemporary African Diasporan Arts	New York	USA
Robert	Battle	Artistic Director	Alvin Ailey American Dance Theater	New York	USA
Donna	Blanchard	Managing Director	Kumu Kahua Theater	Honolulu	USA
Elysia	Borowy-Reeder	Director	MOCAD	Detroit	USA
Marcus	Davey	ED, Artistic Director	Roundhouse	London	UK
David	Devan	General Director & President	Philadelphia Opera Festival	Philadelphia	USA
David	Hamilton	Executive Director	Cedar Cultural Center	Minneapolis	USA
Mara	Isaacs	Producer	Octopus Theatricals	New York	USA
Tarek	Iskander	Artistic Director	Battersea Arts Centre	London	UK
Justin	Kantor	Founder/Owner	Le Poisson Rouge / NIVA Association	New York	USA
Jamil	Khoury	Co-Executive Artistic Directors	Silk Road Rising	Chicago	USA
Perryn	Leech	Managing Director	Houston Grand Opera	Houston	USA
Lourdes	Lopez	Artistic Director	Miami City Ballet	Miami	USA
Michael	Maso	Managing Director	Huntington Theatre Company	Boston	USA
Betsy	McDermott Altheimer	Development and Strategy Consultant	Juxtaposition Arts (JXTA)	Minneapolis	USA
Jill	Medvedow	Director	ICA	Boston	USA
Kristina	Newman-Scott	President	BRIC	New York	USA
Josephine	Ramirez	Executive VP	Music Center in LA	Los Angeles	USA
Deneane	Richburg	Artistic Director	Brownbody	St Paul	USA
Tamar	Smithers	Director of Education and Public Programs	National Museum of African American Music	Nashville	USA
Claire	Spencer	CEO	Melbourne Arts Centre	Melbourne	Australia
Matías	Tarnopolsky	President and CEO	Philadelphia Orchestra	Philadelphia	USA
David	Taylor	President & CEO	Harvey B. Gantt Center for African-American Arts	Charlotte	USA
Eduardo	Vilaro	Artistic Director & CEO	Ballet Hispanico	New York	USA
Harold	Wolpert	Executive Director	Signature Theatre	New York	USA
Allison	Wyckoff	Associate Director, Public and Community Programs	Asian Art Museum	San Francisco	USA
Stephanie	Ybarra	Artistic Director	Baltimore Center Stage	Baltimore	USA

Appendix 3: Resources

AEA has been following COVID-19 coverage since the beginning of March 2020. Below is a selected list of materials especially relevant for this report.

The American Institute of Architects. *Re-occupancy Assessment Tool V1.0.* 6 May 2020.

a-n The Artists Information Company. *COVID-19 Impact survey.* April 2020.

Berkon, Eliza. *"The Pandemic Is Inspiring a Wave of Unionization Efforts. Will It Lead to Greater*
     Protections?" *WAMU.* 13 May 2020.

Brown, Alan. "Life after COVID: who will survive?" *Arts Professional.* 26 March 2020.

BVA BDRC. *Tracking consumer sentiment on the impact of COVID-19.* March – May 2020.

Cascone, Sarah. "By Redeploying Her Staff in Some Ingenious New Ways, the Director of Texas's
     Blanton Museum Has Managed to Avoid Job Cuts Entirely." *Artnet.* 27 May 2020.

CCS Fundraising. *Nonprofit Fundraising Survey: Fundraising Impact of COVID-19.* May 2020.

Center for an Urban Future. *Art in the Time of Coronavirus: NYC's Small Arts Organizations Fighting for Survival.*
     15 April 2020.

Charcoalblue. *Performance Buildings in a Post-Pandemic World.* March 2020.

CI to Eye podcasts / livestreams with Erik Gensler, President of Capacity Interactive, March-June 2020.

CNN. "Kansas City's WWI Museum is avoiding layoffs by giving employees thousands of pages from its
     archives to digitize." 1 April 2020.

Di Liscia, Valentina. "Furloughed SFMOMA Staff Ask Director to Draw Salary of Zero to Retain Workers."
     Hyperallergic. 24 April 2020.

Di Liscia, Valentina. "Why Museums Can't Always Fall Back on Endowments." *Hyperallergic.* 15 April 2020.

Eler, Alicia. "Minneapolis Institute of Art cuts staff in response to pandemic." *StarTribune.* 23 June 2020.

Gelt, Jessica. "The Hollywood Bowl domino effect: Layoffs and furlough follow season
     cancellation." *LA Times.* 13 May 2020.

Gereben, Janos. "The Perplexing Upside of Coronavirus's Devastation of Live
     Performances." *San Francisco Classical Voice.* 25 May 2020.

Global Cultural Districts Network. *COVID-19 Sessions.* March – June 2020.

Graham, Andrew. "Nonprofits stemmed COVID impacts, then the state snubbed them." *RocketMiner.* 19
     June 2020.

Halperin, Julia. "Three Museum Directors Offer a Behind-the-Scenes Look at How They Are Tackling
     the Challenge of Reopening Their Institutions Post-Lockdown" *Artnet.* 27 May 2020.

Harris, Kyle. "The Shaky Future of Denver Arts and Culture Funding." *Westword.* 12 May 2020.

Holmes, Helen. "Closed to Visitors, Museums Are Finding Their Community Outreach More
Necessary Than Ever." *Observer.* 20 March 2020.

Hu, Cherie. "The legal underbelly of livestreaming concerts." *Water & Music.* 8 April 2020.

Hu, Cherie. "Virtual Music Events Directory." 28 May 2020.

Jing Travel. *Growing Your Audience in a Crisis: Lessons from Chinese Cultural Institutions.* March 2020.

Johnson, Paddy. "How Small Arts Nonprofits in the US Are Responding to the Existential
Threat of COVID-19." *Hyperallergic.* 13 April 2020.

Kinsella, Eileen. "SFMOMA Lays Off an Additional 55 Staff Members as Museums Prepare for a
Reckoning Heading Into a New Fiscal Year." *Artnet.* 8 June 2020.

LaPlaca Cohen & Slover Linett Audience Research, "Key Findings from Wave 1." *Culture & Community in a
Time of Crisis* survey. July 7, 2020.

Macdonald, Keza. "Pokémon Go Creator joins Punchdrunk Theater for interactive venture." *The Guardian.*
30 June 2020.

Morgan Stanley. *After the Coronavirus Peak, What's Next?* 15 April 2020.

Morning Consult. *When Consumers Say They'll Feel OK About Dining Out and Other Activities.* 10 April 2020.

Network of European Museum Organisations. *Survey on the impact of the COVID-19 situation on museums in
Europe.* April 2020.

Peacock, Anne. "Bridging the Digital Divide in COVID-19." Think Global Health: An Initiative of the Council
on Foreign Relations. 8 April 2020.

Pierce, Jerald Raymond. "Streams Before the Flood?" *American Theatre (Theatre Communications Group).* 27
March 2020.

Sharp, Sarah Rose. "In LA, Developer Fees Will Be Redistributed as Emergency Arts Grants." *Hyperallergic.*
18 May 2020.

Shugoll Research. *Coronavirus Theater Survey: National Sample of Theatregoers Quantitative Research Findings.*
11 May 2020.

Sisson, Patrick. "The Dying Mall's New Lease on Life: Apartments." *Bloomberg City Lab.* 30 June 2020.

Soloski, Alexis. "Theater's Next Act? A Show That's All in Your Head." *New York Times.* 8 July 2020.

Thompson, Nigel. ""It kills us." Philly's Latinx artists cope with lost incomes and voices amid arts and
culture cuts." *Al Día.* 20 May 2020.

Trend Watching. "10 Cross-Industry Trends That Are Accelerating By the COVID-Crisis."

TRG Arts. *TRG Virtual Roundtable Series.* May – June 2020.

United Nations World Tourism Organization. "International Tourist Numbers Could Fall 60-80% in 2020,

UNWTO Reports." 7 May 2020.

Vary, Adam. "Movie Theaters and Concerts Could See Major Attendance Drop Post-Pandemic
(Study)" *Variety*. 31 March 2020.

Voss, Zannie and Robinson, Jill. *In It for the Long Haul*. May 2020.

Wallender, Andrew. "Nonprofit Workers Turn to Unions During Pandemic Uncertainty." *Bloomberg Law*. 11
May 2020.

WolfBrown. *Audience Outlook Monitor - Preliminary Results.* 13 June 2020.

Work. Shouldn't. Suck. *The Morning(ish)Show – Interviews with Arts and Cultural Leaders.* March – May 2020.

Zeta Metis Advising. *US Funders' Response to COVID-19.* April 2020.

Plus, ongoing coverage from arts desks including:

American Theatre

Artnet

Art Newspaper

Artsy

Arts Professional

Dance Magazine

Financial Times

The Guardian

Hyperallergic

Los Angeles Times

New York Times

The Stage

Wall Street Journal

Washington Post