New York State Council on the Arts

2023 COVID Impact Survey Report

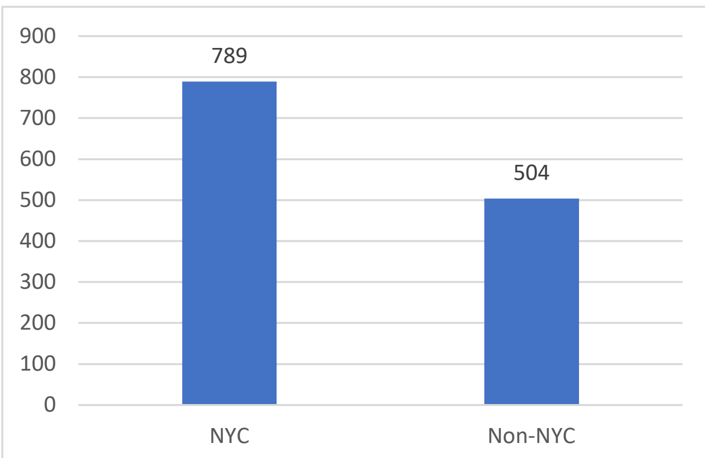
NYSCA's 2023 COVID impact survey received an overwhelming response rate. 80% (1,293) of NYSCA's 1,614 FY2023 grantees responded, giving us tremendous insights into the state of New York's non-profit arts and culture recovery.*

*Survey closed February 6, 2023.

Section 1: Respondent Information

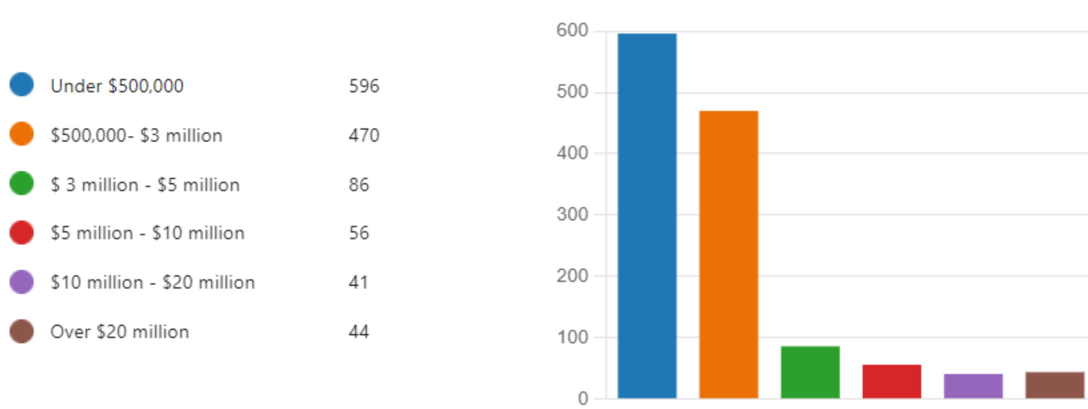
1. What NYS region is your organization located in?

The composition of our NYC/Non-NYC respondents reflects the composition of the FY2023 NYC/non-NYC grantees (approximately 60%/40%) for FY2023.



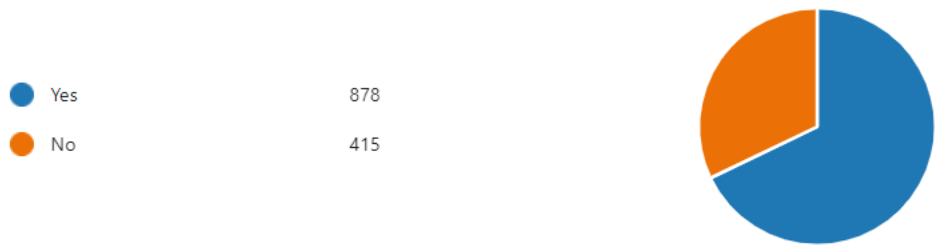
2. Please indicate your organization's budget size.

The budget sizes of the survey respondents closely mirror the budget sizes of all NYSCA FY23 grantees. For example, 46% of respondents have budgets under $500,000, and 52% of direct NYSCA FY23 grantees have organizational budgets under $500,000. Additionally, 82% of survey respondents have budgets under $3 million, and 84% of FY23 grantees have organizational budgets under $3 Million.

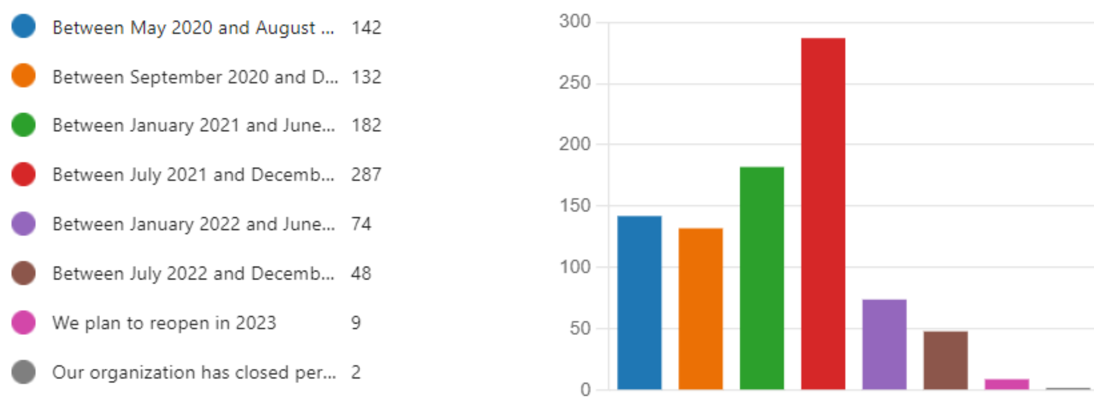


Section 2: Staffing/Jobs Report

1. Has your organization closed or reduce hours as a result of COVID-19?

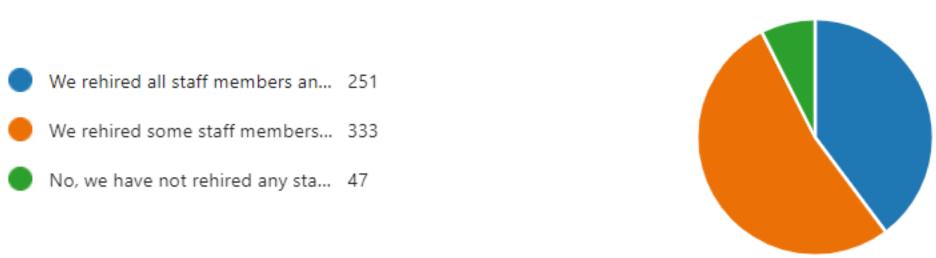


2. If your organization closed, when did you reopen for in-person programming? *(Response Choices: Between May 2020 and August 2020 ; Between September 2020 and December 2020; Between January 2021 and June 2021; Between July 2021 and December 2021; Between January 2022 and June 2022; Between July 2022 and December 2022 ; We Plan to reopen in 2023 ; Our organization has closed permanently)*

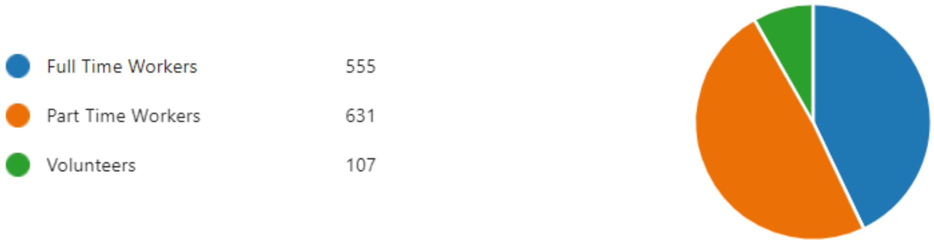


3. Did your organization layoff or furlough staff members and/or contractors as a result of the COVID-19 pandemic?

4. If you answered "yes" to the previous question, have you since rehired staff and/or contractors that were laid off or furloughed as a result of the COVID-19 pandemic?

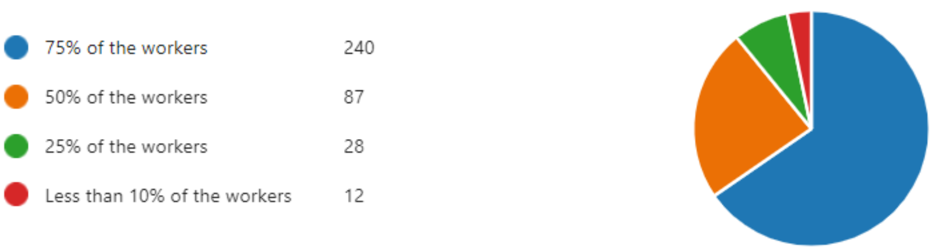


5. What workers make up a majority of your staff?



6. Is your staff currently operating at full capacity?

7. If you answered "no" to the previous question, what percentage best represents your current staffing level? For Example: Our staff has approximately 50% of the workers we had pre-pandemic.

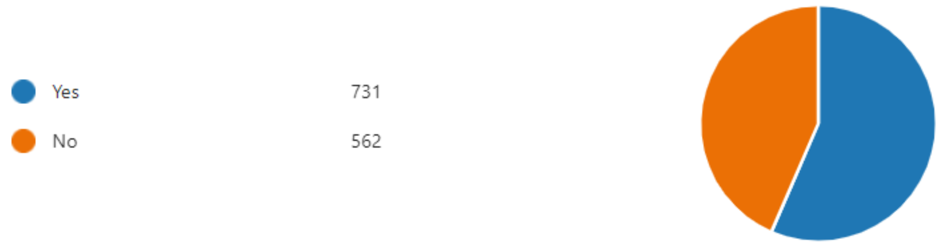


8. Do you anticipate that your organization will return to its pre-pandemic level of hiring artists/ contracted creative workers? *(Response choices: Yes, it has already returned to pre-pandemic levels; Yes, it will return by the end of 2023 ; No, it will take longer than 2023 to return to that level ; No, these artist/creative worker employment changes are permanent)*

   45% of respondents have not returned to pre-pandemic levels of hiring artists and creative workers.

Section 3: Programming Levels and Audience Engagement

1. Are you currently offering the same level of in-person programming you offered before March 2020?



2. If you answered “No” in the previous question, tell us approximately what percentage of in-person programming you are offering now compared to pre-March 2020? For Example: We are offering approximately 75% of the in-person programming that we did pre-pandemic.

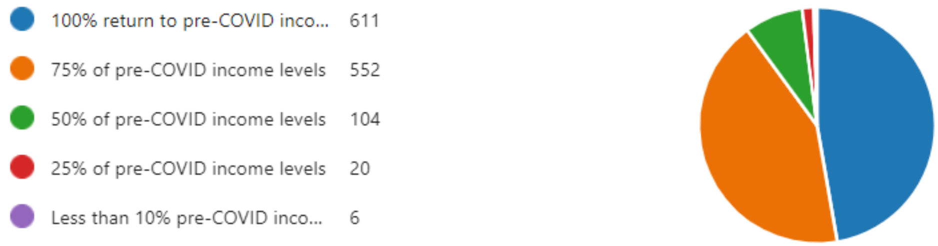
3. What do you project your in-person programming will look like in 2023 compared to 2019?

4. Are you expecting fewer annual visitors in 2023 than you did pre-pandemic (2019)?

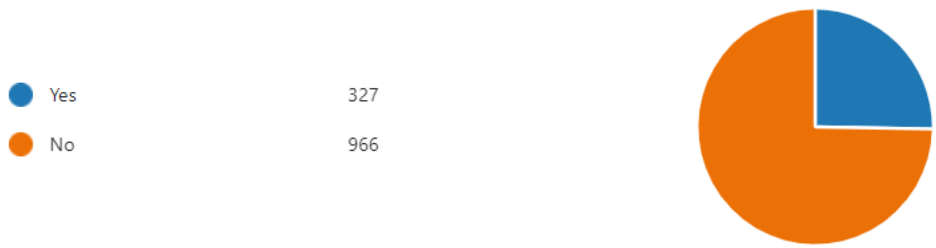
5. If you answered "yes" to the previous question, approximately what percent fewer visitors are you expecting?

Section 4: Revenue and Expenses

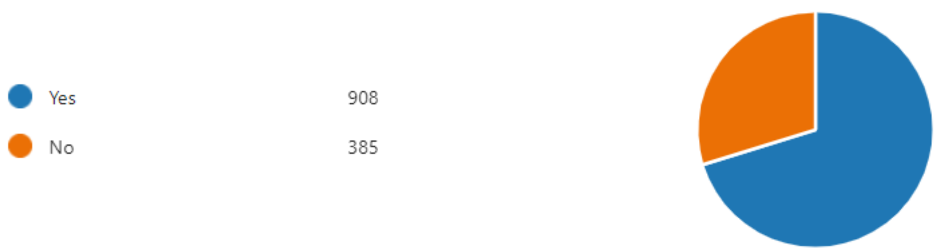
1. What percentage below best represents your projections for FY2023 income (both earned and contributed) compared to your last full fiscal year before COVID-19?



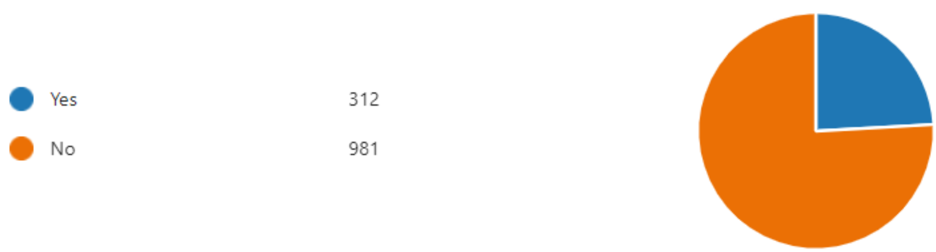
2. Did you receive Shuttered Operators Venue Grant (SVOG) funds?



3. Did you receive Paycheck Protection Program (PPP) funds?



4. Did you receive an Economic Injury Disaster (EIDL) loan?



Section 5: Survey Respondent Insights

Please note that the below are a sampling of the 647 written responses received.

Decreased Income

- Earned income from ticket sales is roughly 35% lower than pre-pandemic. We have reopened two of our three theatres and are producing 6 plays annually instead of 8, and we still have a $4.5 million deficit.
- We are working hard to maximize our levels of presentation and audience attendance. As with everyone, our costs have gone up and audiences are not yet quite back to pre-pandemic levels.
- We have sustained our programs this year primarily due to government support. Next year and beyond, the fiscal outlook is quite dire — earned income is way down as audiences are not yet back to the theater and all our expenses have increased exponentially. We anticipate at least 3 years of rebuilding to get back to 2019 levels. Government support is still vital.
- It has been very difficult to emerge from the pandemic as earned revenue has still not returned to pre-pandemic numbers (roughly 75% of 2019 earned income) and expenses have increased dramatically.

Decrease In person programming/ Online non-monetized

- A percentage of our audience will never return, the public got complacent staying at home or are worried about still contracting Covid in a group of people. It changed how people perceived the importance of learning in person.
- Many live audience orgs are struggling as we grapple with 2022 losses and the slow return of audiences in 2022 and now in 2023. Consumer confidence has been hugely damaged due to all the cancellations and postponements. If trend continues the slow rate of returning audiences will damage the entire sector and we could see numerous closings in 2023/2024. Our best guess is that we may still be fighting this battle for 2-3 more years
- The biggest issue for us now is the return of the audience to 2019 levels. Subscribers are slowly returning to pre-pandemic levels. Local audiences are also down in part due to so much remote work and office buildings being empty. And tourism hasn't returned in full yet.
- Our organization has seen a significant decline in audience attendance compared to pre-pandemic years. We are currently filling an average of 50% of our seating capacity for each production.

Inflation/Increased Expenses

- In order to manage the increased costs of staffing and the necessary upgrades to our buildings, in order to break even, we must be able to earn MORE revenue than we did in 2019. We are operating at a staff deficit because the cost of employing staff has increased and the number of skilled people available to fill key roles and willing to work in person has decreased
- The PPP loans were very helpful and impactful. The PPP loans represent how our government should be supporting the arts. I am in great fear of FY24 - now that the anchor is gone, it will be a tough year considering expenses keep rising.
- Recovery has been very slow and painful. We are likely to have to lay off more staff this year, because funding levels have stayed the same -- from foundations and government grants -- while costs have increased.
- We can not find/ afford skilled labor and the rising costs of utilities and general maintenance paired with aging infrastructure threaten the organization everyday.

- While income will (hopefully) return to pre-pandemic levels; expenses are up by over 20%. Audiences are reluctant or not interested in returning to pre-pandemic levels, which is very concerning. 2023 will be a make or break year for our organization. We no longer have the relief provided by PPP, Shuttered Venues and additional NYSCA funding to assist in making up our operating deficit.