

IMPACT SURVEY

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DATA ON DANCE ORGANIZATIONS, GROUPS & PROJECTS

Updated June 4, 2020 11:00 a.m.

RESPONDENTS AT A GLANCE

- 328 valid survey responses from organizations, groups & projects.
- 281 respondents centered in New York/New Jersey region
- Budgets range from \$3,000 to \$40M
- Groups principally identify as dance companies (73%), dance education providers (28%), dance presenters (25%) and service organizations (19%)

TOP KEY TAKEAWAYS (As of May 17, 2020)

Total revenue loss for dance organizations, groups and projects exceeds \$22M. These losses will deepen as the timeline of the crisis extends.

Nearly three-quarters (71%) of organizations, groups and projects are experiencing cash flow issues and/or in a state of financial hardship. Another 25% aren't sure if they will.

Dance organizations, groups and projects suggest they will lose nearly one-third (31%) of their annual operating budgets (avg.)

The smallest organizations are most impacted, expecting losses that amount to 82% (avg) of their total annual operating budgets.

Dance education providers expect to lose a more (35%) of their operating budgets than dance companies, dance presenters, and facility operators.

The most critical needs are for:

- Salaries and wages (93%)
- General operating support (33%) to cover rent, artist contracted fees and production costs, etc.*
- IT/tech to support remote operations (23%), though the majority have not found capacity to search or ask for resources.
- Communication tools and resources (19%)

*Respondent-identified needs

For most, losses are not covered by insurance. While 65% of responding organizations and groups have general liability insurance, only 8% of those have coverage to offset business interruption losses due to the pandemic.

FINANCIAL IMPACT (As of May 17, 2020)

Dance organizations, groups and projects project losses of at least \$22M in income including \$16.5M in earned revenue and \$5.5M in contributed revenue.

Losses are attributed to class admissions, performance fees/commissions, ticket sales, space rentals, teaching fees as well as donations from individuals.

This is coupled with an increase of \$907K in expenses related to supplies, communication tools, IT/Tech (mostly to accommodate remote work) and other areas, including attorney fees and stipends for employees in lieu of sick leave.

Nearly three-quarters of organizations, groups and projects (71%) are experiencing cash flow issues, and the rest aren't yet sure about the future of their finances.

NOTABLE IMPACTS BY BUDGET SIZE, LOCATION & ROLE

Segmentation analysis reveals that different types of organizations, groups and projects are impacted differently by the crisis.

Generally, the bigger the budget, the larger the projected financial loss. While the smallest organizations, groups and projects (with budgets less than or equal to \$25K) project an average loss in earned revenue of \$7,315, the largest groups project average loss of \$721,780. However, smaller organizations are likely to sustain more significant financial impacts, as these losses represent as much as 82% of these groups' total operating budgets.

Dance education providers expect the most significant losses of any respondent type, projecting losses that on average amount to 35% of their operating budget as compared to dance companies (32% avg loss), dance presenters (25% avg loss) and facility operators (24% avg loss.)

Facility operators are projecting the highest average earned revenue loss (\$113,478 avg vs \$68,400 total avg.) Dance companies are projecting average earned revenue losses higher than other types of groups, including dance presenters, educators, service organizations and other entities.

To date, small budget organizations, groups and projects (with budgets less than \$100K) have been less likely to experience cash flow issues and more are unsure of whether they will. Of groups with budgets less than \$100K, 61% to 64% experienced cash flow issues as compared to 71% of the respondent pool.

More service organizations express need for IT/Tech equipment needs and resources. And more organizations in the Bronx (36%) and Brooklyn (14%) have need for cleaning equipment/supplies than the total respondent pool (11%.) This finding mirrors the individual dance workers survey results, which showed more dance workers in the Bronx were also in need of cleaning supplies.

RESPONDENT POOL: ORGANIZATIONAL INFORMATION

This map shows the distribution of survey respondents by zip code, highlighting a strong response from organizations, groups and projects centered in Manhattan and Brooklyn. Dance/NYC continues community organizing efforts to generate input from more dance entities in the Bronx, Queens and Staten Island as well as parts of New Jersey, Long Island and Westchester County.
