

In April 2020, National Endowment for the Arts Chairman Mary Anne Carter requested the Office of Research & Analysis to survey national service organizations (NSOs) in the arts about how their members are preparing to reengage with audiences and visitors once public health conditions permit doing so. The groups were chosen to represent a broad range of artistic disciplines and reflect organizations for whom live arts audience or visitor engagement is of ongoing concern. Due to federal limitations on the number of surveys that can be fielded, the Arts Endowment distributed 18 surveys and received responses from 16 organizations.

Respondees are: American Alliance of Museums, Association of Art Museum Directors, Association of Children's Museums, Association of Performing Arts Professionals, Association of Writers & Writing Programs, Chamber Music America, Chorus America, Dance/USA, Film Festival Alliance, League of American Orchestras, LitNet, National Association of Latino Arts and Cultures, OPERA America, Theatre Communications Group, Theatre for Young Audiences /USA, and Young Audiences, Inc.

SURVEY HIGHLIGHTS

REENGAGING

- Almost half (44 percent) of NSOs report wide variability in levels of member organizations' preparedness to re-engage with live arts audiences or visitors. A third (33 percent) say their members have developed a response action plan, while 22 percent say their members are developing one.
 - Confronting uncertainty in the present environment, most member organizations are collecting information and planning for multiple scenarios and timelines for re-engagement.
 - Despite this uncertainty, some organizations have declared plans for the fall season, including virtual and in-person programming.
 - Performing arts organizations seemed less confident about reopening soon.
- A number of top safety actions are planned by NSO members.
 - Many NSOs said their members are preparing to use safe distancing methods, such as putting more space between seated audience members or reconfiguring set-ups (36 percent), limiting the number of people and indoor capacity (36 percent), and using outside space (29 percent) and installing new hygiene equipment (21 percent).
 - The majority (71 percent) of respondents said they expected their members to be cleaning and disinfecting their facilities (including interactive technologies or exhibits) around "2-3 times a day" once the economy re-opens.
- NSO members are crafting messaging to inform audience/visitors about safety protocols for re-opening venues.
 - Roughly half of the organizations listed concerns about close proximity and safe distances as a major challenge. Many feared that attendance would suffer as audiences may fear being in tight public gatherings and enclosed spaces.

GOING DIGITAL

- These member organizations are considering creative solutions to address the immediate financial concerns upon re-opening.
 - Most NSOs mentioned virtual or digital arts content as the best solutions to the challenges their members face in re-engaging with audiences/visitors.
 - However, some organizations cited that pivoting to digital also raises issues of inclusion and equity regarding who has access to online programming.
- NSO members will use digital programming as a key business strategy to re-engage with live arts audiences.
 - More than half of respondents mentioned incorporating virtual or digital elements as an additional business strategy, such as digital performances, subscription-based digital content streams, virtual education events, and virtual summer camps.
 - Some members are reevaluating their terms of subscriptions to be more flexible for audiences or visitors who will be unable to attend once economy re-opens.
- NSOs cited the transition to digital platforms as their most significant lesson learned.
 - When asked about main lessons learned during this crisis, the majority (86 percent) of respondents mentioned transitioning to virtual and digital formats and how this activity will affect their programs and operations when the economy re-opens.
 - In some cases, shifting programming online has opened up “untapped audiences” to arts organizations.

STAYING CONNECTED

- NSO members remain concerned about the long-term financial challenges and consider communications and collaboration with peers a likely solution.
 - Beyond the first three months after the economy re-opens, financial challenges will remain a persistent concern, with two-thirds of respondents worried about long-term “financial damage.”
 - Respondents generally concurred that their member organizations will need to work together, learn from each other, and solicit expert help for creative solutions to shared challenges.
- National service organizations report working hard to keep their members connected and informed during this crisis and provide support for members’ programs or operations when the economy re-opens.
 - When asked about the steps they are taking, the majority (89 percent) of NSOs mentioned regular virtual meetings and webinars to provide information and to share issues and concerns.