



THE IMPACT OF COVID-19 ON THE FIELD OF DANCE: PART II

PUBLIC REPORT



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DANCE/USA

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INTRODUCTION

Dance/USA launched the Coronavirus Impact Survey Part I in March 2020 to gauge the initial impact of the pandemic on the dance field in the United States. A year later, Dance/USA launched the Coronavirus Impact Survey Part II to measure the actual social, economic, and operational impact experienced by the field.

The Coronavirus Impact Survey Part II was designed in two sections – the first tailored to dance organizations (e.g., dance companies, presenters, dance schools, dance service organizations and collectives) and the second tailored to individuals working in dance (e.g., dancers, choreographers, independent arts professionals, etc.).

This survey was sent to the leaders of dancemaking and presenting member organizations, individual dancemakers, and member service organizations, who were invited to share the survey with their constituents. 339 completed this survey in comparison to 647 responses from the first survey. The Coronavirus Impact Survey Part I response levels were fueled by worldwide panic regarding the pandemic and its uncertainties. After a year of experiencing the effects of the pandemic and having to adjust to survive the new realities imposed and learned, the responses to this survey are reflective of a more experienced and informed field. Organizational responses (214) were almost twice the individual responses (125), which is counter to the previous survey, where individual responses (349) were greater than organizational responses (298).

Of the 339 respondents, 326 were from the United States and 13 were foreign and included Canada, the United Kingdom, Germany, Australia, and France. Responses from the United States represented 40 states with California returning the largest number of responses at 48(15%), New York at 46(14%), Texas at 26(8%), and Illinois at 23(7%).

Results in this report are based on the 339 participants who completed the current survey. Please note that percentages may not add up to exactly 100% due to rounding. The full version of this report is available upon request from Dance/USA's Research Department at research@danceusa.org.

ORGANIZATIONAL DANCE COMPANIES, SERVICE ORGS, AND PRESENTERS

Topics covered by organizational dancemakers, dance presenters, and dance service organizations in the survey include the following :

- Revenue from ticket sales
- Touring revenue and presenting fees
- Dance companies with school revenues
- Contributed income from individuals, foundations, and corporations

The results also include a comparative analysis of the types and number of productions pre-pandemic versus the pandemic year, versus the current plans; what kinds of actions have been taken to address the current economic and operational situation; and basic demographic information. Organizations with budget below \$1M represented 46% of total U.S. based respondents (206). Organizations with budgets between \$1M and \$5.9M represented 26%, and those \$6M and above represented 28%.

Data from the 214 dancemakers (167), dance presenters (18), and dance service organizations (29) responses demonstrate the following:

Dancemaking Organizations (167 dance companies, 121 responded):

➤ **Ticket Sales**

- Since March 1, 2020, 59 dance companies that reported revenues from ticket sales in prior years, reported a decline in ticket sales of more than 5%, with 44 of them experiencing an average loss of 74% relative to the prior season.

➤ **Touring Fees**

- 99(82%) companies reported that they had not been presented or toured for fees since March 1, 2020.
- Of the 22(18.2%) companies that were presented or toured for fees, 15 reported that fees had fallen by an average of 77%.

➤ **Types of Productions Comparative**

- **Live Productions (77.4% Decrease)** – The number of live productions significantly decreased from the pre-covid era (2018-2019 season) to today by 77.4% across all reporting dancemaking organizations.
- **Holiday Productions (75.3% Decrease)** – The number of holiday productions significantly decreased from the pre-covid era (2018-2019 season) to today by 75.3% across all reporting dancemaking organizations.
- **Outdoor Productions (93% Increase)** - The number of outdoor productions significantly increased from the pre-covid era (2018-2019 season) to today by 93% across all reporting dancemaking organizations.
- **Pre-recorded Productions (478% Increase)** - The number of pre-recorded productions significantly increased from the pre-covid era (2018-2019 season) to today by 478% across all reporting dancemaking organizations.
- **Virtual Productions (252% Increase)** – No virtual productions were reported pre-covid. However, at the onset of the pandemic (2019-2020 season), organizations reported 111 virtual productions. That increased to 391 productions in the current season or a 252% increase.
- **Other Productions (63% Decrease)** - The number of other productions significantly decreased from the pre-covid era (2018-2019 season) to today by 63% across all reporting dancemaking organizations.
- **Total Productions (29% Decrease)** – With the declines in live and holiday productions and the increases in pre-recorded and virtual productions, the overall impact on number of productions as reported was a decrease of 29% relative to the pre-covid era (2018-2019).

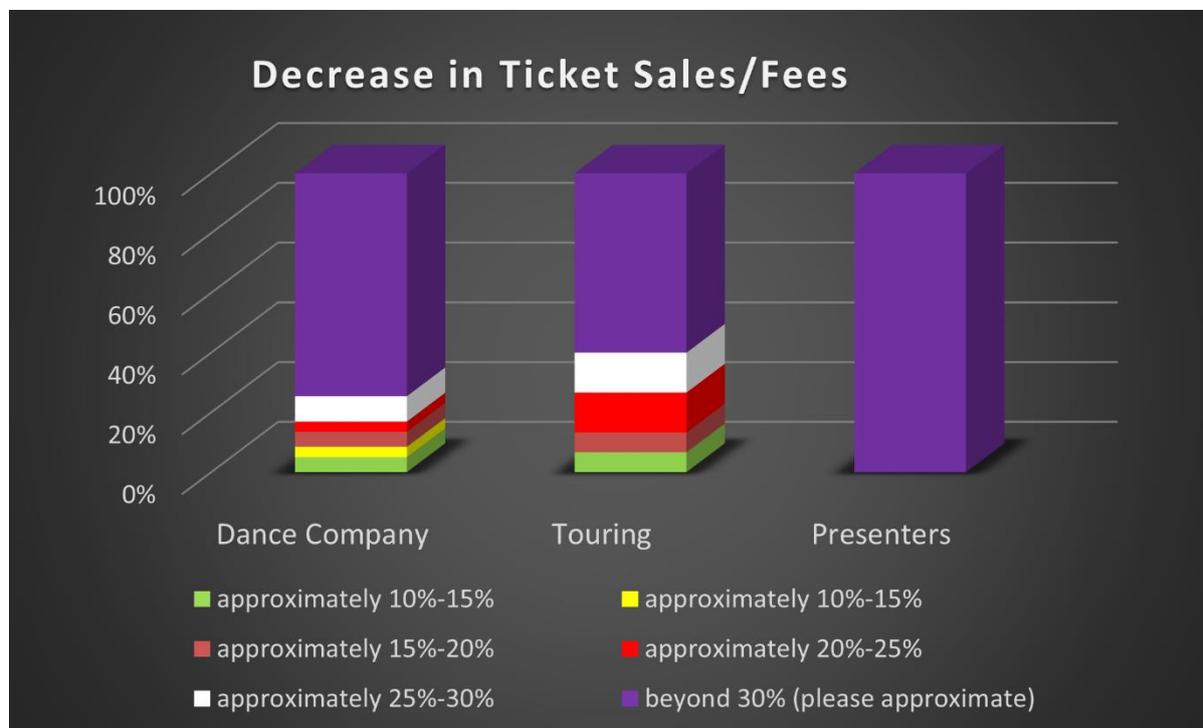
Presenters (18 Presenters, 15 responded):

➤ **Ticket Sales**

- 7 (46.7%) of responding presenters reported a 100% decrease in ticket sales.
- The other 8 respondents reported no change in ticket sales because they did not present any dance companies in the prior or current season, or the data was unavailable.

➤ **Types of Productions Comparative**

- Presenters saw decreases in the number of performances from the pre-covid era (2018-2019, in Live Presentations (82%) and Other Presentations (69%), much like the dance companies.
- Presenters saw **Holiday** presentations in the current season increase by 138%, Outdoor presentations increase by 17% and other presentations increase by 69% relative to the pre-covid era (2018-2019).



Reported percentage decrease in ticket sales and/or fees

Dance companies with dance schools (110 Schools, 15 responded):

➤ **Tuitions**

- 6.4% (7) of schools reported an increase in tuition of more than 5%, with the highest reported increases between 15% and 20%.
- 48.2% (53) reported decreases in tuition by more than 5%, with 46% (23) reporting an average decrease of 59%.

Fundraising Income (214 organizations, 132 responded):

➤ **Individual Support**

- 42% (55) respondents reported increases in individual support in excess of 5%.
 - 34% (19) saw increases between 5% and 10%.
 - 19% (10) saw increases between 10% and 15%.
 - 19% (10) saw increases beyond 30%, averaging 70%.
- 29%(38) respondents reported decreases in individual support by 5% or more.

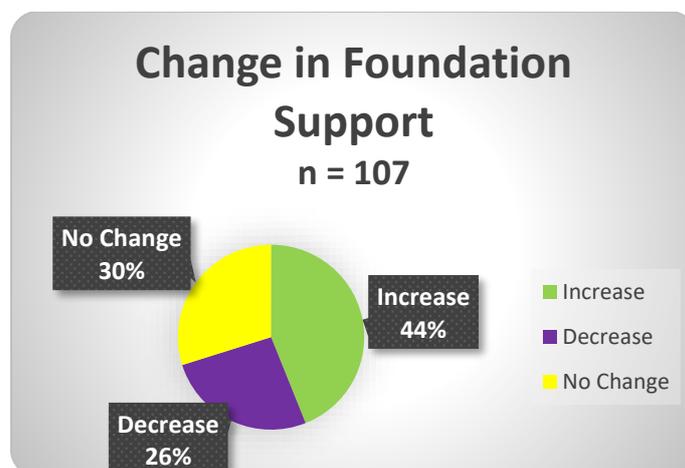
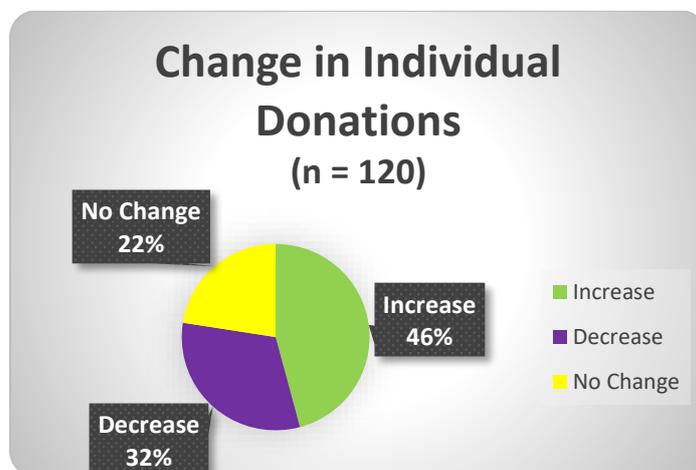
- 81% (31) saw decreases between 5% and 30%
- 19% (7) reported decreases in excess of 30%, averaging 60%

➤ **Foundation Support**

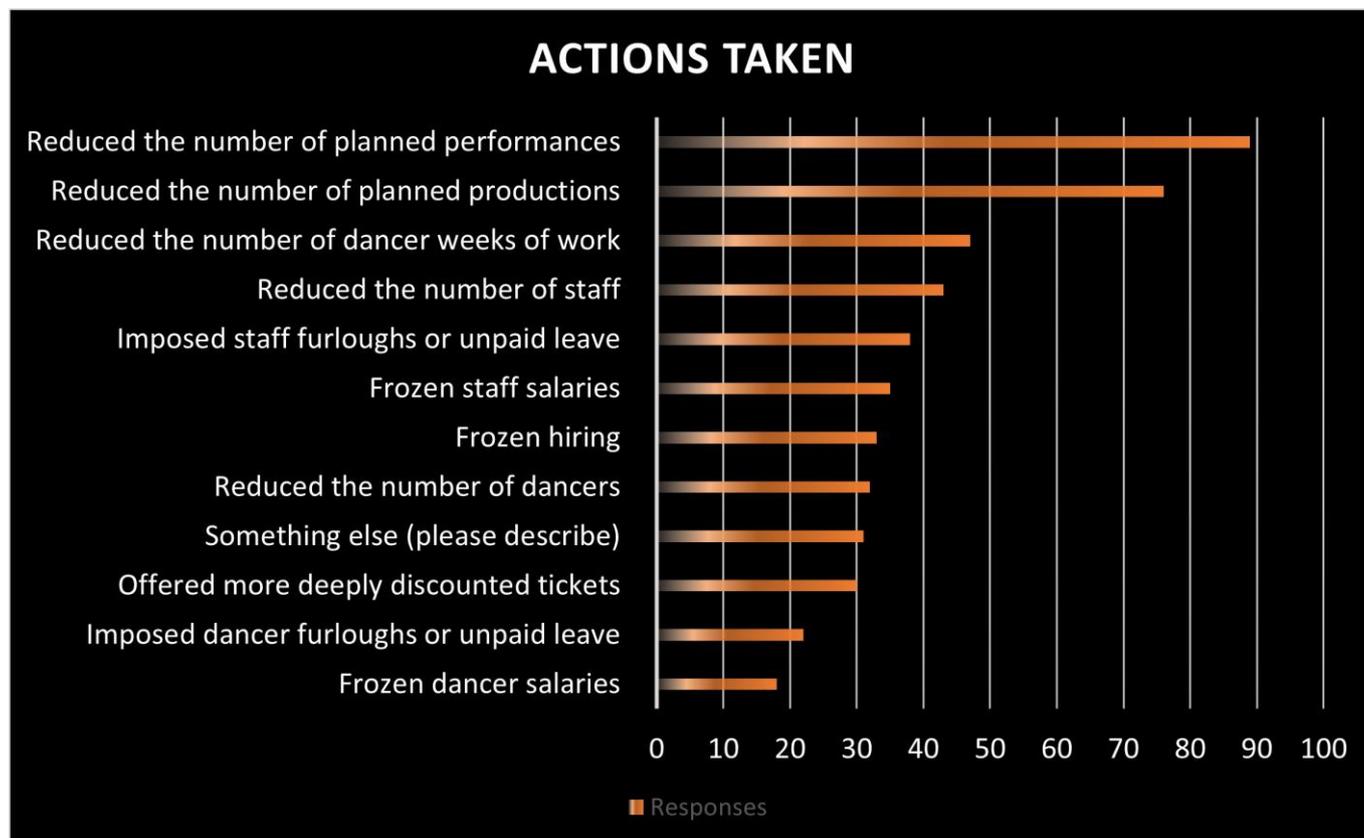
- 36% (47) respondents reported increases in foundation support in excess of 5%.
 - 70% (33) saw increases between 5% and 30%.
 - 30% (14) saw increases beyond 30%, averaging 100%.
- 21% (28) respondents reported decreases in foundation support by 5% or more.
 - 50% (14) saw decreases between 5% and 15%
 - 25% (7) reported decreases between 15% and 30%
 - 25% (7) reported decreases beyond 30%, averaging 93%

➤ **Corporate Support**

- 7% (9) respondents reported increases in corporate support in excess of 5%.
 - 56% (5) saw increases between 5% and 30%.
 - 44% (4) saw increases beyond 30%, averaging 100%.
- 31.3% (41) respondents reported decreases in corporate support by 5% or more.
 - 34% (14) saw decreases between 5% and 25%
 - 31.7% (13) reported decreases between 25% and 30%
 - 34% (14) reported decreases beyond 30%, averaging 62%



Actions Taken This Season:



Organizations took the above actions to manage their operations through complete closures, reduced revenue streams and pandemic restrictions.

Expenses Incurred Due to the Pandemic:

COVID-19 Related Expenses	Responses	Total	Average
Cleaning Related	72	\$ 1,668,999	\$ 23,181
Paid Sick Leave	55	\$ 114,406	\$ 2,080
Deposits/fees for space rentals, events, travel, etc.	51	\$ 188,220	\$ 3,691
Support for remote work	67	\$ 817,563	\$ 12,202
Other	35	\$ 744,189	\$ 21,263
Total	77	\$ 3,533,377	\$ 45,888

Reporting organizations incurred a total of over \$3.5M in expenses to manage restrictions imposed by the pandemic.

The following represents some quotes from reporting dance organizations about their immediate concerns:

“We need to secure funding to help support the basic operations of the organization (rent, staff salaries) for the next 12 months until we can begin to host live performances and school classes.”

“The recovery and sustainability in all aspects: touring, morale, health, in the field.”

Organization Respondent Summary & Concerns:

Through quarantine mandates and pandemic restrictions, organizations had to cancel performances, temporarily close down operations and theatres, and made significant cuts to salaries and expenses across the board to weather this pandemic. Fortunately, individual and foundation support eased the impact for some organizations and allowed them to keep their operations going. Organizations have embraced outdoor, virtual, and pre-recorded performances in order to remain viable and visible to their audiences and communities while still providing some work for their dancers and staff.

Dance/USA’s Director of Government Affairs has consistently kept its members and the field apprised of developments and available relief funds from the Federal Government and Congress CARES Act and American Rescue Plan Act of 2021, since the start of the pandemic. In addition to the Small Business Association (SBA) Paycheck Protection Program (PPP) loan forgiveness relief, Dance/USA was also able to effectively advocate for additional relief through the Shuttered Venue Operators Grant Program (SVOGP), established by the Economic Aid to Hard Hit Small Businesses, Nonprofits and Venues Act, which appropriated \$15 billion for it. The American Rescue Plan Act, signed into law by President Joe Biden on March 11, 2021, appropriated an additional \$1.25 billion, bringing the program funding to a total of \$16.25 billion, with more than \$16 billion allocated for grants.

As the dance field emerges from the pandemic, many organizations have re-opened through both in person and virtual mediums, though not even close to pre-pandemic capacity or levels. Organizations with budget sizes of \$1M or below continue to struggle to gain access to fundraising dollars and resources to afford them the ability to continue operations in the ways that larger budget organizations (\$5M+) have been able to.

The areas of greatest concerns for organizations are re-opening, regaining/achieving financial stability, providing employee and public safety, employees returning to work, and ensuring that dance performances survive.

Dance/USA’s goal in administering this survey and analysis of the field, is to be able to make the necessary connections between organizations in the field, to provide access to needed resources, and continue to advocate on behalf of the field for much needed relief.

INDIVIDUAL DANCEMAKERS

In order to better understand and assess the experience of individual dance makers, survey respondents who identified as individuals (125), were directed to specific questions that explored what their role was in the field, how their income and work have been affected by the restrictions caused by the pandemic, the expenses incurred, and their immediate concerns about returning to work.

Data from 125 individuals in the dance field responses demonstrate the following:

Demographic Information:

- Of the 125 respondents, 49 (68.1%) were Dance Educators, 42 (58.3%) were Dance Performers, 40 (55.6%) were choreographers and 29 (40.3%) indicated that they were Dance Administrators.
- 52% (37) reported that they were employed on a full-time basis, 30% (21) reported freelance independent contractors and 18% (13) were employed on a part-time basis.

Loss in Income & Engagements:

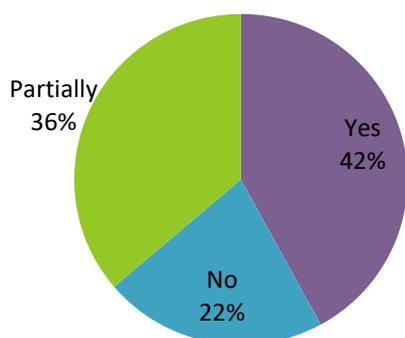
- 50% (63) reported making a combined total income from dance of \$2M at an average of \$32K per person in 2019. In 2020, that combined total decreased to \$1.3M, resulting in an average loss of \$10K or a 32% loss in income experienced by the reporting individuals.
- 48% (60) responded that on average, 73% of their total income came from the dance field in 2019. They also reported that in 2020, that percentage dropped to 54% or decreased by 19%, as a proportion of total income lost from the dance field.
- Respondents indicated that a combined total of 2,995 rehearsal sessions were lost at an average of 66.6 sessions missed per person. Rehearsal engagements had the highest loss rate, followed by Teaching engagements at 1,472 with an average of 35 engagements lost per person.

Engagements	Responses	Total	Average	Median
Consulting	28	49	1.75	1
Commissions	30	80	2.7	1
Performances	55	403	7.3	4
Producing	29	43	1.5	1
Rehearsals	45	2,995	66.6	30
Speaking	23	32	1.4	1
Teaching	42	1,472	35.0	5
Other	21	66	3.1	2
Total		5,140	119	45

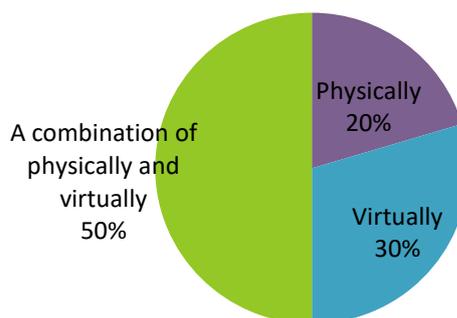
Individual Actions Taken Since the Pandemic:

- 78% (41 of 68) respondents indicated that they were able to do other income-generating work despite losing their income from dance,
- 46% (32 of 69) respondents reported that they applied for unemployment benefits.
- 42% of 125 respondents said they had already returned to work fully, 36% partially and 22% reported that they have not returned to work since March 2020.
- 50% of those that have gone back to work fully or partially, reported that they were working both in-person (physically) and remotely (virtually). 20% were fully back to work in person and 30% were only working remotely.

Return to work ?

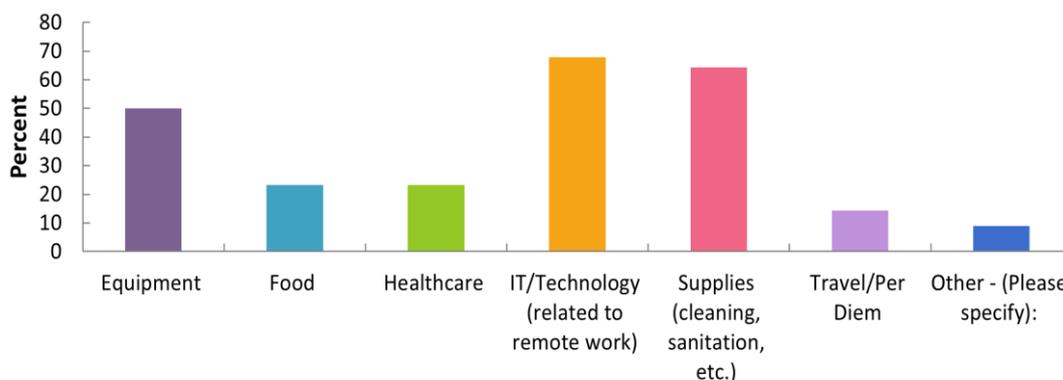


How ?



Increased Spending Due to The Pandemic:

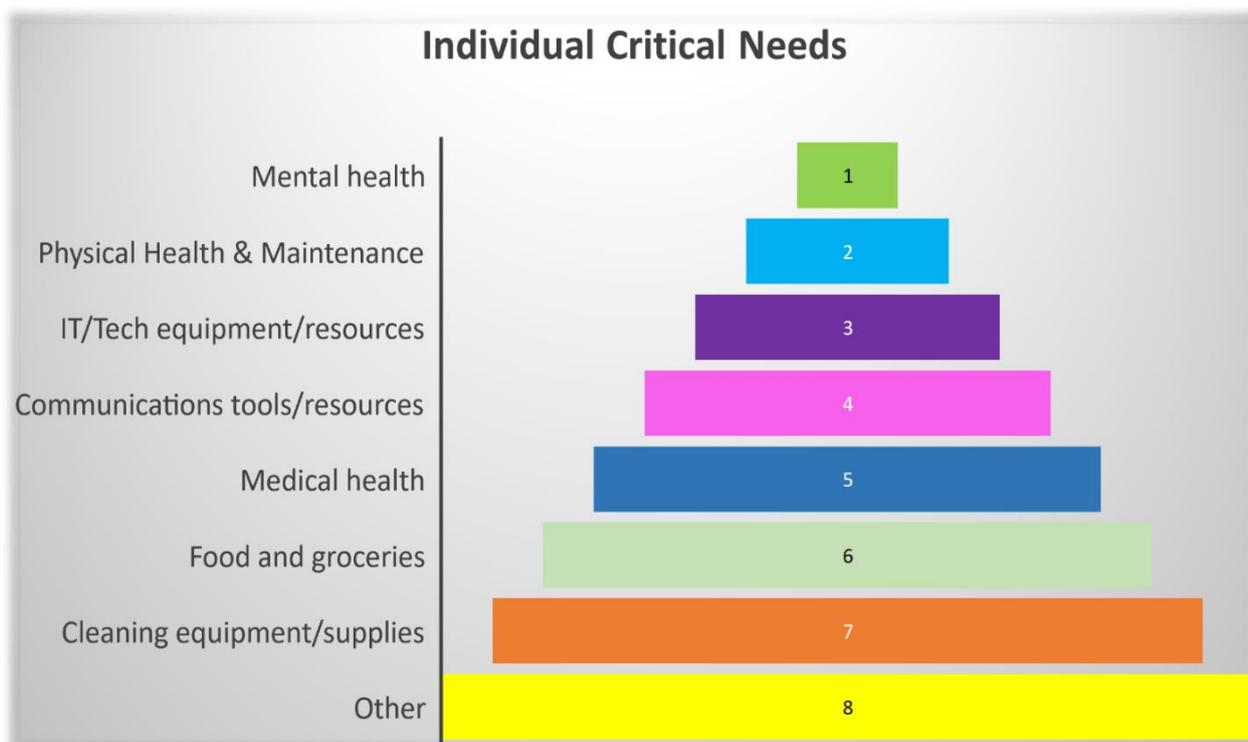
Individual Expense Increases



- Individuals reported the number one area of increased spending was in IT equipment and access to support remote work, followed by cleaning and sanitizing supplies, and then equipment to continue to work from home.

- 51(40.8%) of the 125 respondents reported their expenses had increased in these specific areas on average by \$2,341 as a result of the pandemic in the last year. The total increase in expenses reported was \$119,435.
- 68 (54.4%) reported on whether they had experienced cashflow issues from the pandemic and 45 (62%) reported that they had and 23 (33.8%) reported that they had not.
- 59 (47%) of respondents indicated that they had health insurance and did not have accessibility needs.

Critical Needs:



- The top critical need as expressed by over 50 individuals was access to mental health resources. That was closely followed by support for their physical health/maintenance, and access to IT equipment and resources.
- Over 60% of respondents said they had access to resources or family to help address these critical needs but 30% said that they either did not know where to go or who to contact for support.

The following represent some direct quotes from respondents who identified as individuals responding to their immediate concerns:

“The pandemic has forced artists to learn completely new skills in order to survive. As a choreographer and dancer, I have also really struggled with inspiration to create, and we are set back a year of dancing together. Before even beginning to create, we need to find a way to get funds to get us back to where we were a year ago.”

“I would love to have a larger conversation about the mental and emotional impact of this time as a community. There need to be opportunities for us to come together and heal from the trauma of all the various losses of this year instead of trying to move on as if nothing has happened.”

Individual Respondent Summary & Concerns:

The impact of this pandemic has been exceptionally critical on individuals in the dance field. In addition to the financial impact, individual dancemakers who typically spend hours on a daily basis, pre-pandemic, honing their art form and molding their bodies and minds, have been subject to quarantines and isolations that threaten their livelihood and future in dance, even if they survive the virus.

The relief provided from the federal CARES Act, through unemployment relief, stimulus relief and for independent contractors, the Small Business Association (SBA) Paycheck Protection Program (PPP) , lightened the blow for many individuals. For those dance individuals who are not citizens or residents of the United States, and there are many, the financial impact was devastating.

Many dance individuals turned to offering virtual classes and rehearsals, to keep in shape and augment their income. While many are returning physically to work, there are many that have not been able to, or that are working on a hybrid (virtual/in person) basis. This lack of connection for an art form that is steeped in physical connection, and the incredible losses experienced, has led to the number one critical concern for individuals: access to mental health resources.

Dance/USA’s goal in administering this survey and analysis of the field, is to be able to make the necessary connections between individuals and organizations in the field, to provide access to needed resources, and continue to advocate on behalf of the field for much needed relief.