



# WORCESTER CULTURAL IMPACT SURVEY

A STUDY OF THE LOCAL IMPACTS OF COVID-19 ON  
THE ARTS AND CULTURAL SECTOR



CULTURAL  
COALITION

# Who?

Members of the Worcester Worcester Cultural Coalition were invited to respond May 13 - May 18. **34 respondents\*** completed the survey.

**34%** Performing Arts

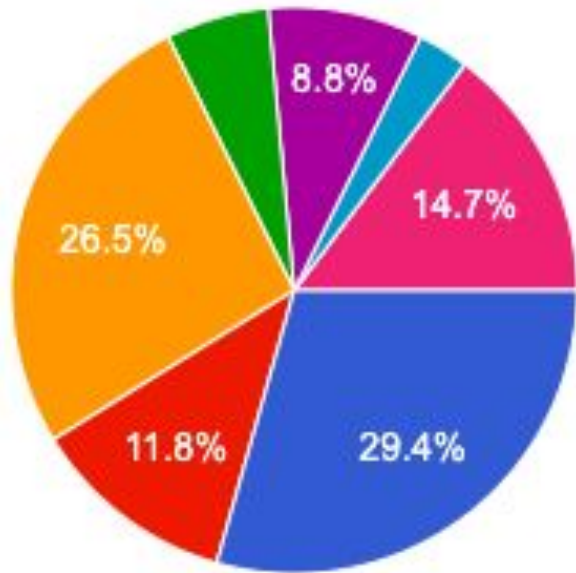
**20%** Visual Arts

**14%** Museums

**32%** Other including Festival, Poetry, Libraries, Artisan and Trades Makerspace, Game Development, Public Radio, Music Education, Arts Service Organization, etc.

\*This survey was shared with 76 cultural Worcester cultural organizations.

# Size of the Organizations



- Under \$100,000
- \$100,000 - \$249,000
- \$250,000 - \$499,999
- \$500,000 - \$999,999
- \$1,000,000 - \$2,499,999
- \$2,500,000 - \$4,999,999
- Over \$5,000,000

# How much revenue has been lost to date due to COVID-19?

**TOTAL:** \$6.29M

**RANGE:** \$0 - \$3M

**MEDIAN:** \$18,000

**AVERAGE:** \$179,714

Note: Representative of 34 out of an estimated 88 cultural organizations in the Worcester area.

# How much revenue does your organization anticipate losing due to COVID-19?

**TOTAL:** \$12.63M

**RANGE:** \$0 - \$5M

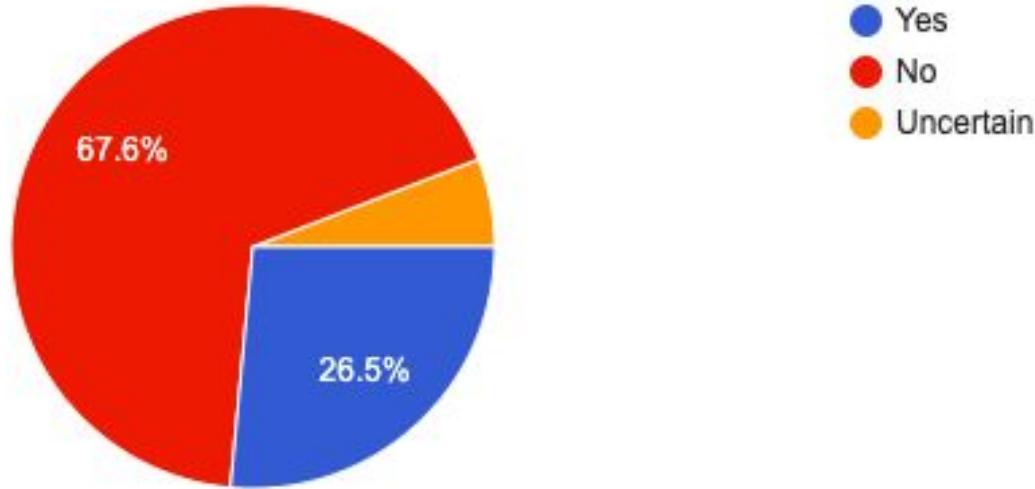
**MEDIAN:** \$50,000

**AVERAGE:** \$360,914

Organizations expect their losses to double through this pandemic.

Note: Representative of 34 out of an estimated 88 cultural organizations in the Worcester area.

# Does your organization have an endowment with a board-approved draw policy?



**The majority of Worcester's cultural organizations do not have endowments.**

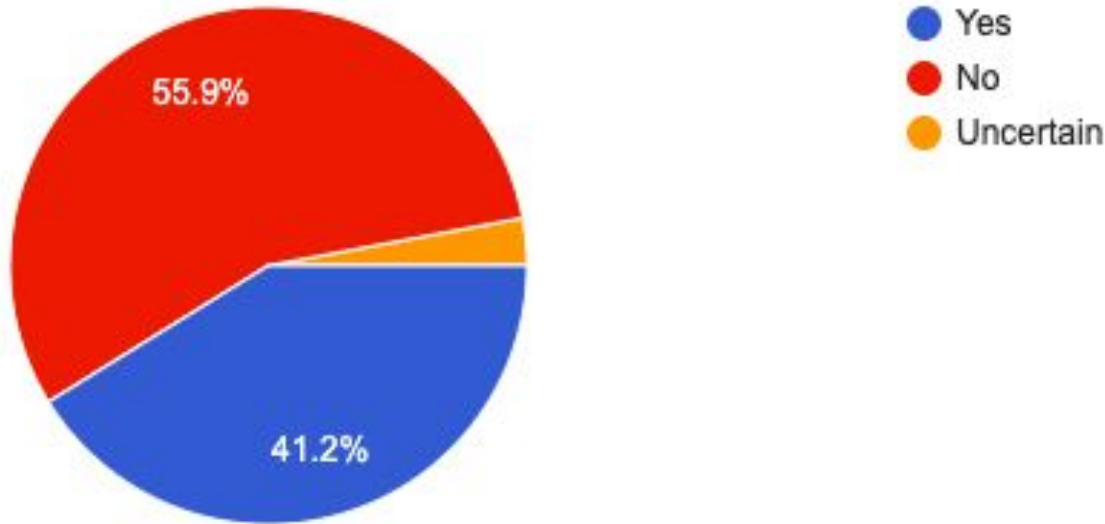
Of those with a known endowment:

56% reported they would not be increasing their draw down.

22% would be increasing their draw down.

22% were uncertain at this time.

# Does your organization have board-restricted funds?



Over half of Worcester's cultural organizations **do not have board restricted funds available.**

Of those organizations with board restricted funds, the **majority (79%) are uncertain if they will be redirecting these funds** as COVID-19 recovery to cover operating costs.

# Grant Funding

Nearly two thirds (65%) of organizations have received restricted grant funds.

Of the organizations which received grant funding, 50% report funders have authorized use of funds for COVID-19 recovery and ongoing operating costs during closure.



# Employees

<b>Pre-COVID Employees Summary</b>	
TOTAL PAID EMPLOYEES	1,035
FULL TIME	405
PART-TIME	415
CONTRACT	450

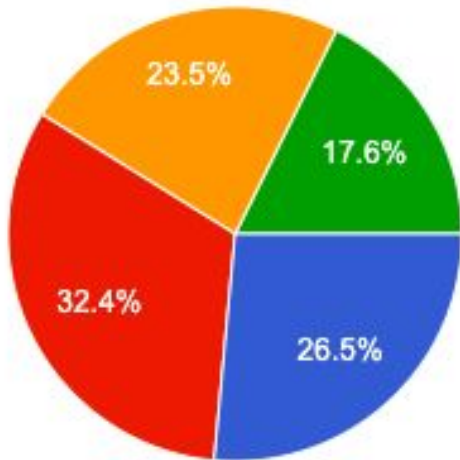
Range of Total Employees	0 - 210
Median of Total Employees	8

Of those organizations with paid employees, **21% has already laid off or furloughed members of their staff.**

To date:

- 11 have been laid off
- 233 have been furloughed

# Reducing Salary or Hours Post-COVID?



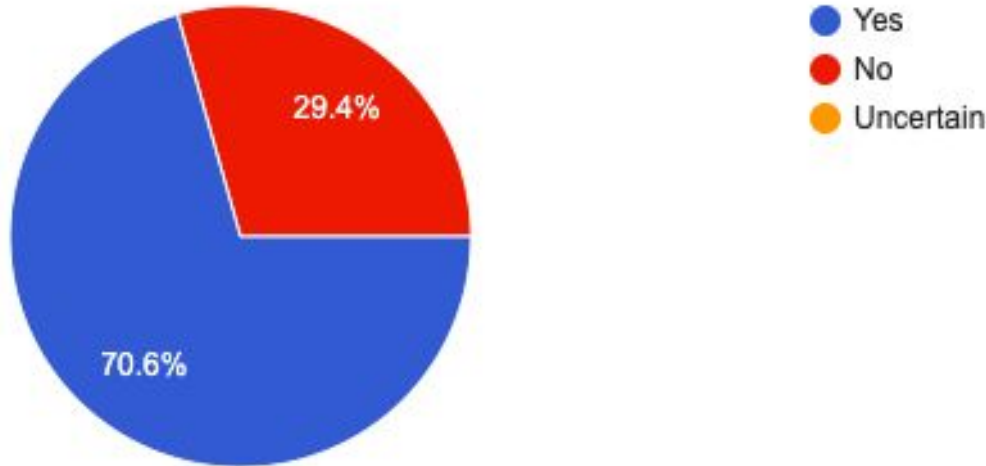
**Average reduction of salary:**

36%

**Average reduction of hours:**

38.4%

# Has your organization applied for aid?



**The majority of organizations have applied for aid.**

**70% applied** for The Small Business Administration Paycheck Protection Loan Program (**PPP**).

**20% applied** for The Small Business Administration Economic Injury Disaster Loan (**EIDL**).

Other sources of funding: Mass Humanities CARES Act, NEA, NEH

Nearly all who applied received funding. Only one was uncertain because the application was still pending.

# Funding Received

	TOTAL RECEIVED	RANGE	MEDIAN	AVERAGE RECEIVED
PPP	\$3,947,652	\$700 - \$1M	\$48,950	\$197,382
EIDL	\$109,000	\$4K - \$75K	\$10,000	\$21,800

Of those who received PPP, **29% do not have funds available** once PPP is used to continue to support staff and another **29% is uncertain** if they will have funds available.

# Choice Quotes - Impact of COVID-19

“We won't be doing our normal income for the foreseeable future.”

“Fully disruptive to the spring of our 2019-2020 season and a full cancellation of next season.”

“It will be very challenging to remain open if this level of loss continues.”

“Depending on the governor's phase timing for opening public theater space, the numbers provided for lost revenue could grow significantly larger than stated and we would deplete reserves.”

# Choice Quotes - Impact of COVID-19 (cont.)

“Our larger challenge is not only in immediate revenue loss, but the loss of growth opportunity. We anticipate the full impact will be more apparent as we move over a span of 12 to 24, perhaps 36 months.”

“Massive pivot to developing online/virtual services.”

“There is a demand for virtual programming that we are struggling to fulfill given the all-volunteer nature of our organization.”

“We lost 90% of our revenue overnight. Operating at reduced capacity to enable social distancing inside the venue isn't possible for us.”

“The immediate effects are devastating; we have had zero income since having to close and anticipate that we will remain effectively closed for the next 6 -8 months.”

# Choice Quotes - Impact of COVID-19 (cont.)

“This pandemic has been devastating to our organization as it has been to museums across the country [...] Reopening is not the answer here either, [...] we know from a public health perspective how damaging that will be if done too soon, and additionally the social distancing impacts on admission revenues, paired with increased costs needed to manage a socially distant museum, are completely untenable.”

“Drastic. Making us scramble to stay alive.”

“We've seen about a 30-35% drop in enrollment for music lessons as a result even though we switched to doing online lessons. Mostly due to parents losing jobs from Covid or not having the technology at home to do online lessons.”

“Limbo- no programming can take place at this time.”



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## Questions and Answers

We welcome your thoughts as we navigate this uncertain time together. Arts+Culture+Creativity=Community.