



National Performance Network Economic Survey

Summary

In the summer of 2010, National Performance Network (NPN) surveyed artist-centered organizations and individual artists, a group that is frequently under the radar of many art surveys. NPN is grounded in a belief that this sector is an invaluable, but often under-recognized, part of the arts ecology and that this sector had been affected in particular ways by the economic downturn.

Alternate ROOTS, Creative Capital, the MAP Fund, the Consortium of Asian American Theatres and Artists and the Network of Ensemble Theatres collaborated on the distribution of the survey, which received 800 responses. The survey was in two parts: 296 organizations completed the first part, and 472 artists completed the second part. (Some completed both sections.)

Key Findings

Demographic Profile

- A slight majority of respondents identified as organizations/people of color.
- 71% identified as artists and one-third identified as teachers.
- 70% of those responding earned less than \$50K a year.

Financial Condition of Organizations

- 60% have budgets under \$250,000.
- Fluctuation in income is a common attribute, a result of project-based funding, multi-year funding and/or wide swings in anticipated contributed income.
- For 50% of respondents, budgets decreased or did not meet goal. 40% of these saw a decline in foundation grants.
- In general, organizations saw decreases in support from state, corporate and individual sources.
- Revenues increased for 19%. The greatest growth was seen in in-kind donations, ticket sales, special events/fundraisers, foundation grants and individual contributions.
- 124 organizations incurred a deficit last year. 108 organizations ended last FY with a surplus; more than half of those were organizations with budgets of less than \$250,000.

Organizational Personnel

- More than one-third had decreased the number of personnel.
- One-quarter had no change in personnel; a large majority of these were organizations with budgets less than \$250,000.
- 29% of organizations relied on increased use of volunteers and interns.
- One in 8 organizations added personnel, mostly in development and marketing.
- Many respondents had restructured in previous years: moving from year-round salaries to a project-by-project basis, adding management staff, going on hiatus, etc.
- Many have eliminated health insurance.

Artistic Production

- Artistic production was diminished, with shorter/fewer engagements, payment of smaller artist fees and decreased activity in general.
- Partnering and collaboration, as well as increased educational activities, were cited as strategies for survival.

Conditions for Artists

- 85% made less than \$30,000 from their artistic work.
- For 41% of respondents, incomes are the same as last year; 40% are making more.
- A majority (53%) made less than one-fourth of their income from artistic work.
- Only one in 8 make all their income from artistic work: 88% hold second jobs.
- More than half are teachers and nearly half hold a day job not in the arts, or freelance in some way.
- Leading sources of income for artists are earned income (product sales, tickets, royalties) and contracts from arts organizations, schools or colleges.
- Many are making less and/or smaller work.
- Some are increasing collaborations, increasing their funding research, promoting their work more and creating new opportunities to expand their services and skills.
- Nearly one-quarter do not have health insurance.

**This survey was funded by the Doris Duke Charitable Foundation
and compiled and analyzed by Kathie deNobriga.**



National Performance Network Economic Survey

Introduction

In the summer of 2010, National Performance Network (NPN) initiated a survey to assess the economic conditions under which its particular sector of the field was operating. This sector, loosely defined as artist-centered organizations and individual artists, is frequently “under the radar” of many arts surveys. Believing that this sector is an invaluable, but often under-recognized, part of the arts ecology and that this sector had been affected in particular ways by the economic downturn, NPN procured funding from The Doris Duke Charitable Foundation to undertake this survey.

Methodology

CEO of NPN MK Wegmann invited several colleague organizations to participate in the survey. Alternate ROOTS, Creative Capital, the MAP Fund, the Consortium of Asian American Theatres and Artists (CAATA) and Network of Ensemble Theatres (NET) accepted her invitation. Each of the collaborating arts service organizations helped shape the survey questions and distributed it to their respective (electronic) mailing lists:

- Alternate ROOTS (1,200 addresses)
- Creative Capital (400)
- MAP Fund (800)
- CAATA (17,725)
- NET (300)
- NPN (480)

Membership in these organizations is over-lapping (i.e., a Creative Capital grantee might also be a member of Alternate ROOTS and an NPN Partner). Although NPN staff knew that many respondents would identify with more than one organization, no attempt was made to reduce duplications by compiling and crosschecking lists. Instead, in their uniquely crafted cover notes, each participating organization instructed their constituents to fill out the survey only once, and encouraged them to share it freely with their colleagues.

When the survey closed at end of August 2010, 800 surveys had been started; 577 (or 72%) were completed. 296 respondents completed Part I, the organizational section of the survey, and 472 respondents completed Part II, the individual artist section. Respondents were encouraged to fill out both sections if appropriate. Quotes from the survey are sprinkled throughout this report, unattributed for reasons of confidentiality.

In addition to the data gathered through the NPN-initiated survey, this report will reference surveys conducted by Leveraging Investments in Creativity (5,380 arts respondents), GuideStar (6,434 nonprofit organizations) and National Association of Latino Arts and Culture (63 organizations and 127 individual artists).

Demographics of Respondent Pool

81% of respondents are affiliated with one or more of the sponsoring organizations:

- Alternate ROOTS (271 respondents)
- Creative Capital (84)
- MAP Fund (103)
- CAATA (32)
- NET (109)
- NPN (182)

More than 35% are affiliated with or funded by other organizations. Organizations most frequently cited were:

- Theatre Communications Group (30 affiliations)
- National Endowment for the Arts (11)
- Fractured Atlas (11)
- Association of Performing Arts Presenters (10)
- The Field (9)
- Dance USA (9)
- NALAC (9)
- Americans for the Arts (9)

Geography / Racial / Cultural Identity

Nearly two-thirds identified as being from urban areas (65%), with 15% identifying as rural and 13% as suburban.

A slight majority of respondents identified as a person or organization of color. Of the 800 respondents:

- 49% identified as white
- 27% as multi-racial
- 21% as African American

- 17% as Asian American
- 14% as Hispanic/Latino
- 7% as American Indian/Alaskan Native or Native Hawaiian/Pacific Islander

Many respondents checked more than one box, perhaps reflecting the multiple identities that are prevalent in this sector of the field.

71% identified as artists, and one-third also identified as teachers. Other common identities were LGBTQ (20%), students (14%), and persons with disabilities (7%).

Income / Age

Seventy percent of those responding earned less than \$50K a year: 38% identified as “low income” (less than \$25,000 annually) and 32% identified as “middle income” (between \$25K and \$50K annual income).

21.5% identified as “high income” (more than \$50K).

Nearly 72% of respondents were between 30 and 65 years old. 19% were 18-30 years old, and 9% were over 65 years old.

Organizational Financial Health

The current economic atmosphere puts pressure on any organization's weaknesses. I see it as an opportunity to focus on essential services and to re-evaluate the core of the organization. [It's] also a great time to develop new, more sustainable systems and such.

Organizational Budget Size

Sixty percent of respondents had budgets under \$250K:

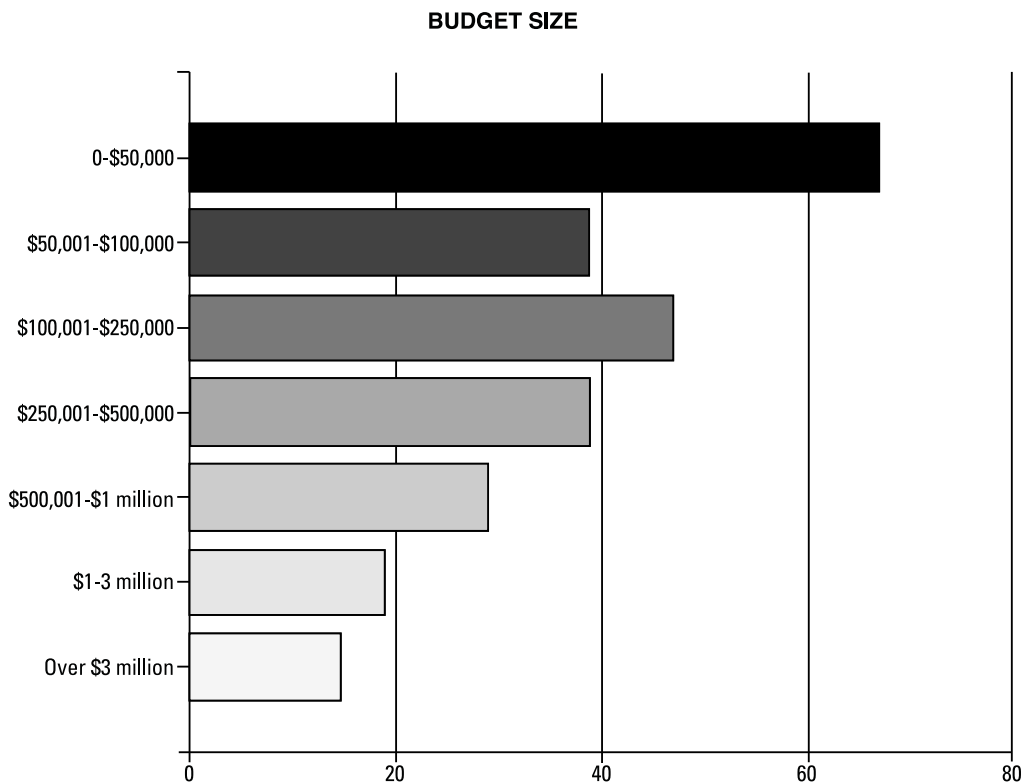
26% of organizations had budgets under \$50K

34% had budgets between \$50K and \$250K

27% had budgets between \$250K and \$1M, and 13% of respondents reported budgets over \$1M.

NALAC organizations were roughly consistent: 54% had budgets under \$250K, and 14.2% had budgets over \$1M.

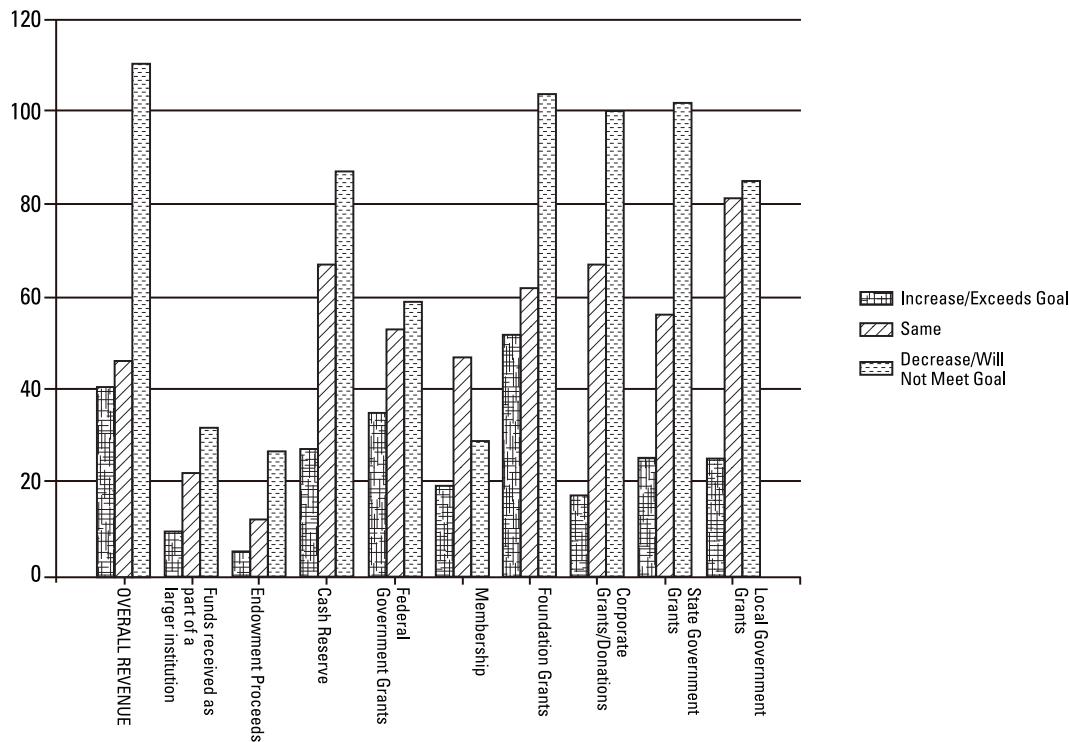
If everyone involved in my work (personnel and collaborating artists) were to get paid wages commensurate with their experience, and wages that could support their livings, our actual budget range would be closer to \$200,000.



Many respondents noted that their income varies widely from year to year. Fluctuation seems to be a common attribute, a result of project-based funding, multi-year funding and/or wide swings in anticipated contributed income. Many organizations adapt by embracing flexibility, which is often interpreted by funders as instability.

Revenues/Funding

Respondents were asked to compare their organization's current revenues/funding, across a variety of sources, compared to one year ago.



Decreases

Half of all 261 respondents said that, overall, their budgets decreased or did not meet their goal. This is consistent with the LINC findings, which reported that 52% of respondents saw a decrease in their budgets. 60% of NALAC respondents reported a decrease.

The GuideStar report, which surveyed nonprofits in all sectors, reported that 28% saw a budget decrease, suggesting that the arts/cultural sector is experiencing a higher rate of budget decrease than other nonprofits.

Of the organizations that reported a decrease, 40% saw a decline in foundation grants. Data from the NALAC survey is even bleaker: 76% saw a reduction in grant award amounts.

The 'recession' in the arts in New York City has been going on for 10 years at least. Each year organizations like ours are forced to scramble to find funding as institutional donors shift their focus to follow a new perceived crisis. The crisis is that there is no LONG-TERM thinking, and no sustainable support for the base public good that we provide: art. The most recent recession is simply demonstrating this fact.

It's been a damn tough year and with people not paying us on time (sometimes almost as late as 6 months) we have decided to spend the next 6 months focusing on strengthening our infrastructure and not taking on any projects or clients until we feel solid again.

Organizations also experienced decreases from other sources:

- 39% decrease in state grants
- 39% decrease in corporate donations
- 36% decrease in individual donations

Although 33% of organizations experienced a decrease in local government support, for nearly the same percentage (31%), funding stayed the same. A similar dynamic is noticed in federal grants: whereas 23% experienced a decrease, 21% received the same levels of funding. [42% received no federal grants.] Further research might reveal the “bright spots” (what’s working) for groups who were able to retain their funding from local and federal government sources.

Increases

19% of respondents reported that overall, their revenues increased; 21% experienced no change. Only 11% of NALAC respondents reported an increase. GuideStar reported that 41% of organizations showed budget increases.

Of those reporting increases in this survey, the greatest growth was seen in in-kind donations, ticket sales, special events/fundraisers, foundation grants and individual contributions (“asking more people for smaller donations...”), with at least 20% of respondents reporting increases in each of these areas. By contrast, two-thirds of GuideStar respondents cited a decrease both in number and size of individual donations.

Organizations are focusing more on individual donors: “Part of the reason for our increase is that we are asking more and asking smarter.”

The following income sources stayed about the same, comparing this year to last year.

- 53% of organizations reported the same levels of support from in-kind
- 38% support from individuals
- 36% from ticket sales/other earned
- 30% from special events/fundraisers

“Earned income is the same, but the number of gigs has gone up. They all just pay less.”

Theatre Communications Group (publisher of *American Theatre* magazine) surveyed the tax returns of 1,825 nonprofit theatres, and found that “on average, smaller theatres were more likely to achieve positive change in unrestricted net assets....With considerably lower levels of investments, those theatres tended to be more immune to market swings.” Fewer fixed operating costs and the “exuberance of being flexible” are other contributing factors to their stability.

Our ticket shortfall was affected more by snowfall than the economic climate.

Surplus/Deficit

About one-quarter of respondents answered the question: *In your last fiscal year, did you have a surplus or deficit?*

Responses were remarkably even: 53.4% (124 organizations) said they incurred a deficit this year, 48.6% (108 organizations) ended the year with a surplus.

Surplus

Of those organizations that ended the year with a surplus, more than half (57%) were organizations with budgets of less than \$250K. Surpluses among the larger institutions (\$1M or more) were less frequent (12%).

Surpluses were modest: of 108 organizations who reported a surplus, 47 of them (44%) reported a surplus of 5% or less of their budget. Another 15 organizations (14% of the respondents) reported surpluses of 6-10%. Eight organizations posted surpluses of more than 11% of their budgets.

Deficit

Only half of the 124 organizations provided an amount (expressed as a percentage compared to their annual budgets), but of those that did, 29 (23%) showed a deficit of 5% or less, 12 had deficits of 6-10% of their operating budgets, and 24 had deficits of 11% or more. Nearly one-fourth of organizations with budgets less than \$25K ran a deficit. Deficits were reported in 16% of the larger institutions (budgets of \$1M or more).

For many, the long hard slog of 2008-2009 has sapped their energy for continuing the fight: *"We were able to end our last fiscal year 2009 with a \$75,000 surplus, pay back our deficit and end with a \$25,000 cash reserve. This came at a cost that cannot be repeated this year, though I see a more difficult year coming up."* *"Cash flow has been a major issue, and a detriment to company morale."*

Cash Reserves

71% of 251 respondents had cash reserves of some kind, in comparison to the NALAC survey that found 55.6% of their organizations had cash reserves. 35% of the NPN sample experienced a decrease in revenues from their cash reserves; 27% reported no change from the prior year.

To survive, we had to move to an all-volunteer staff structure and produce the same number of plays on a lower budget, but ironically, funders 'punish' organizations that have scaled back by making them eligible for fewer grants based on the organization's smaller budget and 'reduced operational needs.' It's a vicious, downward cycle where the poor keep getting poorer. We hope that funders who truly understand the inequity and financial illogic of this situation will step up and invest in--instead of abandon--small, non-profit arts organizations.

Adaptations to Economic Conditions

[Our] long-standing strategy of low fixed costs and partnering to realize productions has proven successful in the current climate.

Personnel

Organizations were asked how they dealt with the economic downturn in terms of their personnel. More than one-third (37%) had decreased the number of personnel. 31% had decreased salaries and 21% had implemented hiring freezes. Many had eliminated health insurance.

Consistent with the increased levels of individual support referenced earlier, 29% of organizations relied on increased use of volunteers and interns. Several organizations cited increased board activity and commitment as a key to keeping their operations going. *"[We are] engaging our board more. [They developed] new strategies regarding engagement and private fundraising."*

Interestingly, 25% of those responding said there had been no change in their personnel: a large majority of these were organizations with budgets of \$250K or less. This was roughly consistent with the GuideStar data, which showed that 30% of organizations had experienced no change in their personnel budgets

(although these organizations generally have larger budgets).

Several respondents commented that they had restructured in previous years: for example, moving from a year-round salary to a project-by-project basis or adding management staff. Some took a deliberate hiatus, which they dedicated to research and development. Those who restructured their operations before 2008 generally indicated greater feelings of security: *"We deliberately and consciously downsized two years ago, and it has helped us be in a very stable financial status now..."*

A common response was to increase focus on the development staff (paid or volunteer): *"For two years we made severe cuts to junior staff, development staff and marketing expenses – things only got worse. This year we re-structured what had become a top heavy-organization."*

We have been dedicating a lot of time and energy to figuring out a new cheaper administrative structure for the organization. We have instituted an internship program to help.

12.5% actually added personnel, mostly in development and marketing. *"We added personnel, both paid and volunteer, in order to help us better manage our finances so that our art is not hurt by the economic downturn."*

Artistic Production

We may suspend all new creative work for the upcoming fiscal year. We intend to continue educational program and touring activities.

The survey asked organizations how their artistic activity (exhibiting, producing or presenting) had been impacted by the economy.

Slightly more than one-third noted shorter/fewer engagements (37%), payment of smaller artist fees (35%), and decreased activity in general (32%). Again, this was consistent with the LINC data. Several respondents are concerned about the impact of the economy on their ability and willingness to take artistic risks: *"It is harder to justify [risks].... that is deadly for an arts organization."*

The downturn represents opportunity as well: more than half of those responding reported a change in marketing tactics (increased use of web, etc.). The LINC survey reflected a much larger percentage (76%) using similar strategies.

Partnering and collaboration, as well as increased educational activities, were cited as strategies for survival. 50% of respondents increased their community partnerships and collaborations – roughly comparable to the LINC survey response of 54%. *"Facing economic uncertainty has made us do things (like*

partnering) that [we] should have been doing already." *"We have realized that by increasing partnerships with other organizations, we can share our workforce and funds and have more and better events for our efforts."*

Many organizations are "doing more with less" and several cited Michael Kaiser's advice to *"increase our programming with reduced staffing."* Others are finding a change in perspective: *"We are trying to look at 'health' not in terms of growth, as we had in the past, but in terms of flexibility."*

Some organizations are using this time to re-think or re-tool their operations. At least one organization went on artistic hiatus: *"We plan to continue using this time to develop new ideas and revamp previous curricula, re-work choreography to accommodate changes due to knee injuries and difficulty of finding funding to begin new group projects."* From another group: *"We are educating ourselves to give ourselves more options, develop our talents, skills and abilities, and enhance our program."* And, finally, *"It purifies the reasons for being involved in the arts."*

These comments are consistent with the findings reported in the November 2010 issue of *American Theatre* magazine. The current season is, *"for many theatres, an opportunity to refocus and find clarity in mission statements, branding, financial practices and staff structures."*

It has increased the amount of creativity that we feel compelled to bring to our projects.

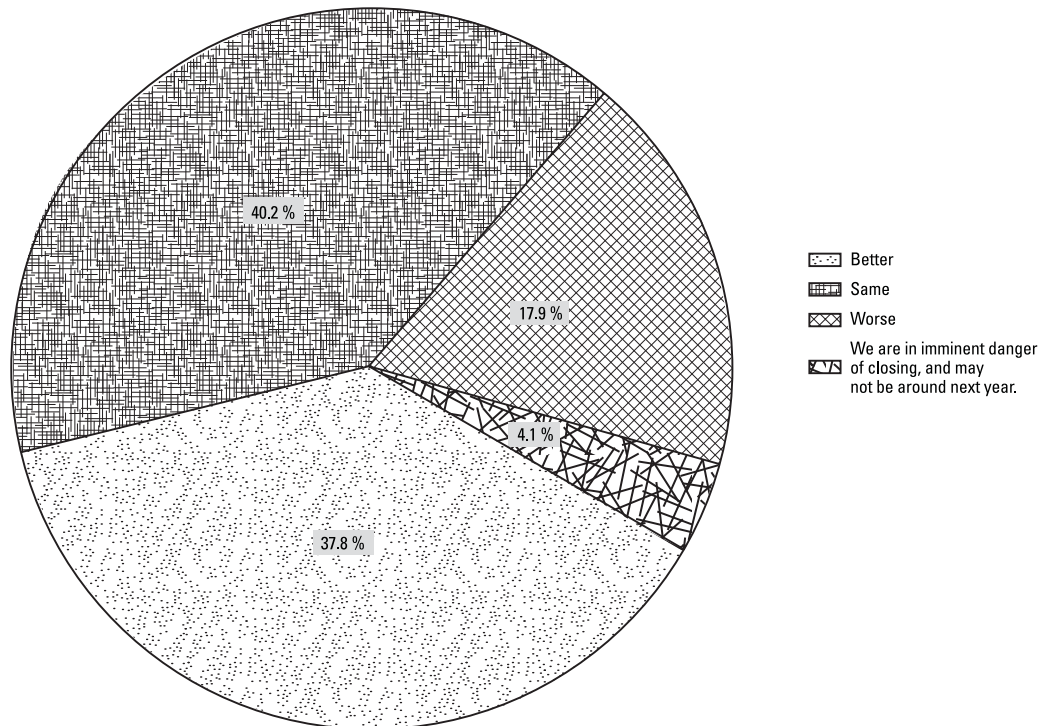
Forecasting

"The good thing about being so low on the radar is that we have learned well to do with very little."

The survey concluded the organizational section by asking, "How do you anticipate next Fiscal Year will be?" In answering this question, most respondents displayed an optimism that seems to belie the current realities: 40% felt the next FY would be about the same in terms of economic resources. 38% felt their economic situation would improve, and 18% thinks it will worsen.

Twelve of the 296 responding organizations (4%) expect to close their doors in the coming year. GuideStar reported twice that percentage, with many (40%) being organizations with budgets of \$1M or more

The biggest thing for us is to be ambitious, be wary, but don't go small as a response to economic hardship. Think big, go big, and make ourselves necessary.



Respondents are feeling generally optimistic, although many commented that their projections were often based on hope – or despair. One remarked, "Our organization is so small that there is only room to grow." On the other hand, another commented, "We have to hope for better - it can't get any worse."

Individual Artists

The survey's second half asked a series of questions intended to determine where and how artists make their living, and particularly their levels of income, both as a total and as a percentage of their income from all sources. 472 respondents completed this portion of the survey.

Artistic Income

The survey asked, "What is your total annual income for your artistic work?" 85% made less than \$30K from their artistic work. 44% reported making less than \$5,000 per year and another 41% made between \$5K and \$30K. Only 15% made over \$30K. The LINC survey revealed that 66% of respondents reported making less than \$40K per year.

The NALAC study found that nearly 79% of artists were making under \$50,000 a year: more than half of these were earning under \$25,000. These statistics are a stark reminder of the economic reality that challenges most artists in this sector of the field.

Artists were also asked if their artistic income had changed in the past year:

| Incomes: current year compared to prior year | Increase | Decrease | Same |
|--|----------|----------|------|
| NPN | 19% | 39.5% | 41% |
| NALAC | 16% | 58% | 24% |
| LINC | N/A | 51% * | N/A |

**almost a third of these saw a decrease of 50% or more*

Artists adapted to the decrease in a variety of ways: "I reduced the scale of projects including smaller casts. Am currently taking a 6-month hold on all projects in order to recover financially and strategize." People took day jobs, cut back on expenses, increased efforts to sell CDs or crafts, relied more on family support, or changed their business models. "Doing more teaching" was a common response.

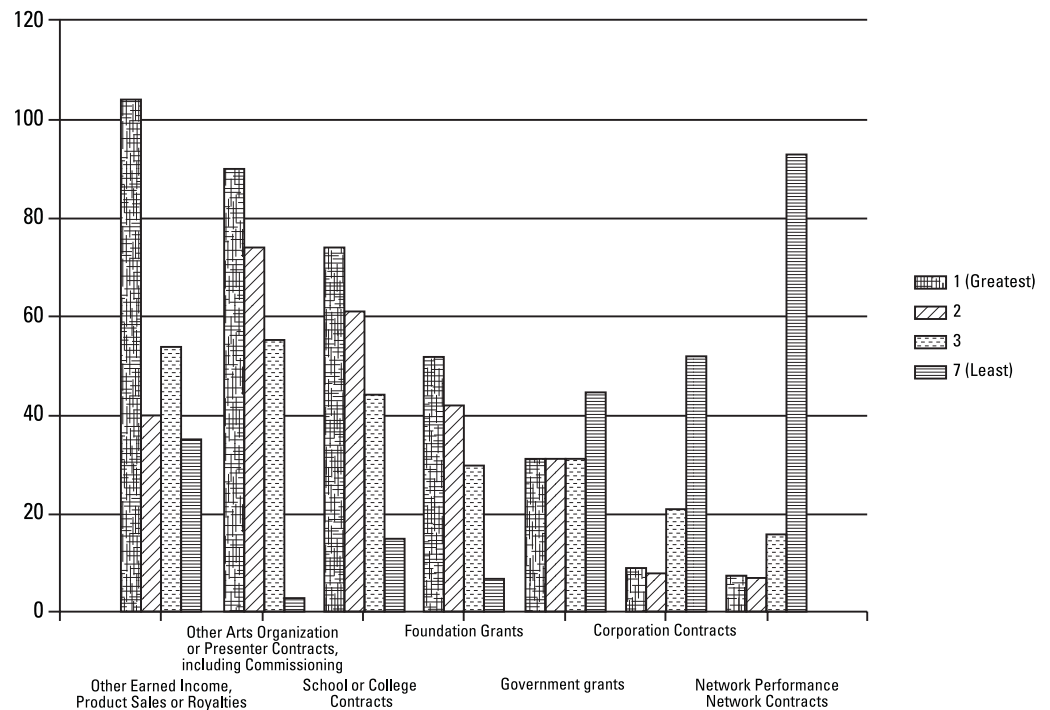
I have a steady, part-time, art-related job. I recently switched from W-2 to independent contractor and formed an LLC to streamline my various incomes and expenses. So far it has given me greater financial control and the flexibility to pursue a wide array of artistic projects in such an unstable economy.

Artists who have to work outside their discipline must increase their work load in order to make a living, thereby decreasing the amount of time they are free to produce art. Thus, for artists who are not employed in work that engages their artistic discipline, their talents may go totally unutilized. Without grants that allow artists to use more time in their discipline, our country loses the artistic work that breeds further creativity across the disciplines and "talent dies on the vine."

Sources of Income

Artists, as has long been recognized, make a living by cobbling together income from sources other than artistic work. In this survey, a majority (53%) made less than one-fourth of their income from artistic work. Only one-eighth (12.5%) made all their income from artistic work: in other words, nearly 88% held second jobs. (The LINC survey found that 66% of artists had second jobs and 21% held more than two jobs.) More than half (53.4%) are teachers and nearly half (49.5%) hold a day job not in the arts, or freelance in some way. 46% reported being employed by a nonprofit 501c3 organization.

A substantial number of respondents indicated they were teaching more, in both academic and community settings. *"I haven't changed my work, except by continuing to develop as a teaching artist and performer, and word of mouth continues to be the way most new contacts bring me in; repeat business is my strongest source of income."*



When artists *do* make income from their artistic work, much of it (33%) is from earned income (product sales, tickets, royalties, etc). Contracts from arts organizations (including commissioning, but excluding NPN contracts) account for another 30%. Contracts from schools or colleges generate 26% of income, and foundation grants yield 21% of income.

Artistic Adaptations

Many respondents indicated they are making smaller work or creating fewer art works and productions. An equivalent number are seeking or creating new opportunities or ways to expand their services and skills. *"[We're] not able to tour ensemble pieces anymore because it's cost prohibitive. Have instead sought more individual presenting, more teaching and consulting support from colleges, universities, community organizations, and small foundations. A lot more self-production projects. Moving away from performing, more into writing and teaching."*

Many are spending less and endeavoring to save more. *"Space rental is better than owning a space at this time for us;" "We work our butts off when we can in order to build up the coffers to do the art. We then plan the art based on the cheapest route."*

Several cited lowering their "price point" in order to broaden their markets. *"I knew it would be impossible to raise the money to do the beautiful work I wished to make, so I changed everything but my vision of what I wanted audiences to get from my work. I looked at my list of projects...and chose the one that I thought would be successful. I made the smallest budget possible, and I'm having success."*

Some respondents reported they are increasing their collaborations, increasing their research into funding sources, and promoting their work more. A few are "escaping to grad school" or increasing the commercial nature of their work.

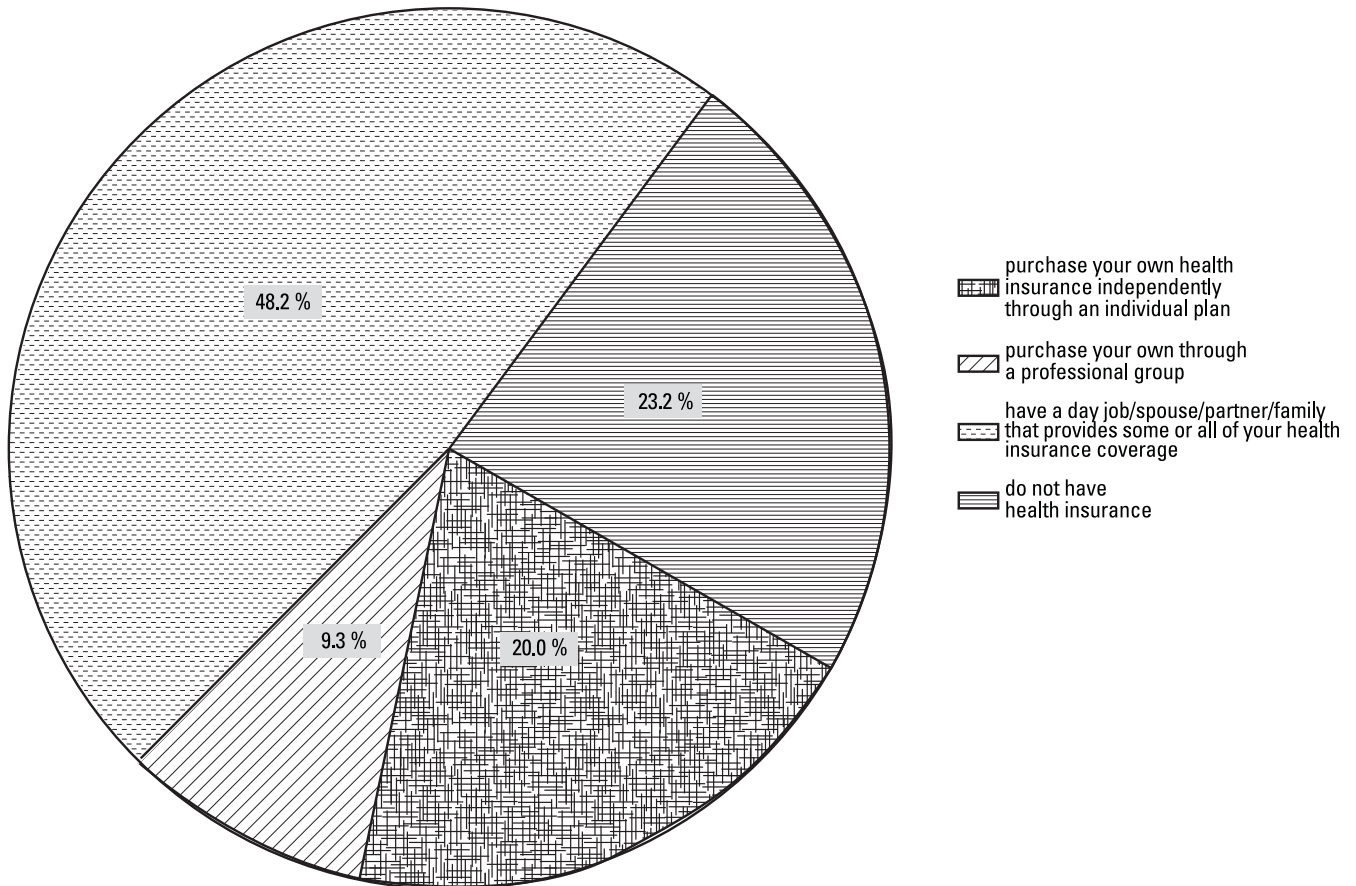
A few have given up their artistic pursuits, or are putting their artwork "on the back burner." A few respondents spoke of growing their own food – *"huge organic garden, fruit trees, and making food from scratch!"* and bartering for necessities and art/production supplies.

Forecasting

Respondents were nearly evenly split on whether next year would be better or the same (39.7% and 37.8%, respectively). 22% thought it would be worse. This is in sharp contrast to the NALAC survey which reported that 57% of artists did not expect to meet their 2009 projected income.

Many indicated they would just “keep on keepin’ on,” neatly summarized by *“I am struggling, but I am not giving up.”* Overall, the predominant tone of responses was optimistic, with only a few respondents giving in to despair, although many were discouraged. *“I’ve been through recessions before so I understand that the arts are the first to get cut. But this one has lasted longer and made significant cuts to other income sources including teaching and other non-profit work. It’s tough.”*

Health Insurance



77% of respondents have some sort of health insurance coverage (compared to 40% in the LINC sample): 29% purchase their own, either through an individual plan or a professional group, and 48% have coverage through a day job/spouse/partner. Of the 409 respondents who answered this question: nearly one-quarter (23%) do not have health insurance at all.

Appendix:

Special Focus on Organizations of Color and NPN-identified Organizations

As a matter of policy and practice, NPN asks organizations to self-identify their racial or cultural heritage: 470 of the 800 respondents (59%) self-described as American Indian/Alaskan Native, Asian/Asian-American, Black/African-American, Hispanic/Latino, Native Hawaiian/Pacific Islander or Multi-Racial. This section of the report looks at this group separately, and at the 182 organizations that identified as being affiliated with NPN in some way.

Demographics

The NPN-identified respondent pool was generally more diverse than the general pool.

| Race / Culture | General Pool | NPN-identified | Organizations/artists of color |
|--|--------------|----------------|--------------------------------|
| White | 49% | 36% | 19% * |
| Multi-racial | 27% | 40% | 46% |
| African American | 21% | 27% | 35.5% |
| Asian American | 17% | 15% | 29% |
| Hispanic/Latino | 14% | 25% | 24.5% |
| Native (Hawaiian/Alaskan, American Indian, PI) | 7% | 3% | 4% |

* Several organizations checked 'white' in addition to another racial/cultural identity.

The NPN sample was more likely to be urban, a teacher and LGBTQ, and slightly less likely to identify as an artist.

| Other identity; Geography | General Pool | NPN-identified | Organizations/artists of color |
|---------------------------|--------------|----------------|--------------------------------|
| Artists | 71% | 67% | 70% |
| Teachers | 33% | 38% | 35% |
| LGBTQ | 20% | 32% | 24% |
| Students | 14% | 16% | 18% |
| Persons with disabilities | 7% | 9% | 8% |
| Urban | 65% | 75% | 69% |

The NPN pool was also more likely to report incomes at both ends of the scale (low and high), and is slightly younger.

| Age; Income | General Pool | NPN-identified | Organizations/artists of color |
|-------------------------|--------------|----------------|--------------------------------|
| Low income (< \$25K) | 38% | 42% | 43% |
| Middle income | 32% | 33% | 35% |
| Higher income (> \$50K) | 22% | 27% | 22% |
| Ages 18-30 | 19% | 21% | 25% |
| 30-65 years old | 72% | 69% | 64% |
| Over 65 years old | 9% | 10% | 11% |

Organizational Financial Health

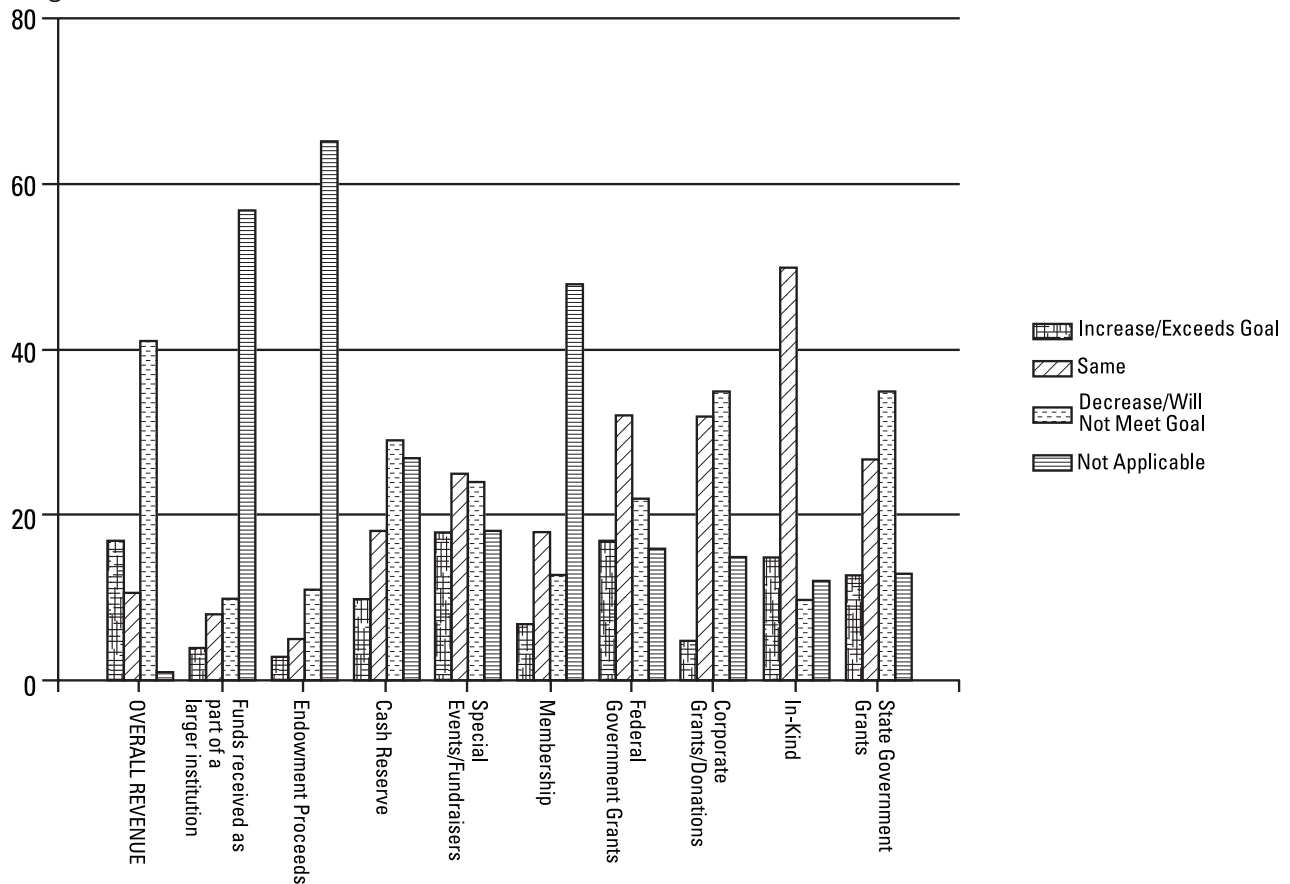
In general, NPN-identified organizations reported larger budgets than in the general survey. NPN Partners require a certain level of organizational capacity in order to qualify as a member and are accessing national resources that may be beyond the reach of many organizations surveyed in the LINC and NALAC samples. However this sub-set includes answers from 182 respondents that identified being affiliated with NPN in some way, but there are only 70 Partners in the formal network.

| Organizational budgets | General Pool | NPN-identified | Organizations of color |
|------------------------------|--------------|----------------|------------------------|
| Less than \$50,000 | 26% | 6% | 23% |
| Between \$50,000 - \$250,000 | 34% | 28% | 32.5% |
| Between \$250,000 and \$1 M | 27% | 43% | 30.9% |
| More than \$1 million | 13% | 23% | 13.7% |

Revenues/Funding

How does your current organizational situation compare to this time last year?

In response to this question, NPN-identified organizations showed some significant differences: whereas decreases were predominant in nearly every category for the general pool (refer to chart on page 7), NPN-identified respondents reported increases in memberships, endowment funds and funds from a parent organization.



This chart represents the NPN-identified groups; the chart for organizations of color is virtually identical, with the exception of showing an increase in federal government grants.

NPN respondents were slightly more likely than the general pool to show a surplus and slightly less likely to have incurred a deficit.

| | Surplus | Deficit | Cash Reserves |
|------------------------|---------|---------|---------------|
| NPN-affiliation | 53.9% | 46.1% | 24% |
| Organizations of color | 46.5% | 53.5% | 28% |
| General pool | 48.6% | 53.4% | 71% |

Adaptations to Economic Conditions

Be extremely frugal, spend money only if necessary... and be grateful that times are not even worse and that we will survive (we always do).

47% of respondents had decreased the number of personnel (a response consistent with the 2008 NPN survey, which reported 46% taking this step). This strategy had been adopted by 37% of respondents in the general pool and in the organizations of color. 32% of NPN-identified respondents, and 30% of organizations of color, reported a decrease in salaries (the prior survey response was 22%), a figure consistent with the general pool response of 31%.

NPN-identified respondents were more likely than the general pool to engage in increased partnering and collaboration: 61% compared with the general response of 50%. The NPN pool was also more likely to have adapted by changing their marketing tactics: 59% reported this as an adaptive strategy, compared with 51% of the general respondent pool, and yet also more likely to have cut back on their marketing activities (27% vs. 21%). These findings were consistent with the pool of organizations of color.

| Forecasting Next Year (organizational response) | General Pool | NPN-identified | Organizations of color |
|--|--------------|----------------|------------------------|
| Likely to improve | 38% | 27% | 37% |
| Stay the same | 40% | 41% | 41% |
| Likely to be worse | 18% | 28% | 17% |
| In imminent danger of closing | 4.1% | 3.2% | 4.4% |

In the previous NPN survey, only 2% thought the next year would improve, and 72% thought it would be worse.

Individual Artists

NPN-identified respondents were much more likely to be employed by a nonprofit, and nearly twice as likely to make 100% of their living from their artwork.

| Income Amount/Source | General pool | NPN-respondents | Artists of color |
|---|--------------|-----------------|------------------|
| Be employed by a 501c3 | 46% | 67% | 50% |
| Make less than \$5,000/yr from artwork | 44% | 23% | 40% |
| Make over \$30,000/yr from art work | 18% | 24% | 18% |
| Make less than 25% of their income from artwork | 53% | 37% | 47.5% |
| Make 100% of income from artwork | 12.5% | 23% | 14% |
| Hold jobs as teachers | 53% | 72% | 55% |

Health insurance

NPN-identified respondents were less likely to have health insurance: 30% of the NPN respondents and 27% of the artists of color have no coverage at all (compared to 23% in the general survey).

Forecasting

NPN respondents were less optimistic than the general pool: 32% thought that next year would improve (compared to 40%), and 28% thought it would be worse (compared to 22.5%).

References

- *The Artists and the Economic Recession Survey: Selected Findings, Leveraging Investments in Creativity* (summer 2009)
- *2009-2010 Organizational and Artist Economic Survey*, National Association of Latino Arts and Culture (summer 2010)
- "Theatre Facts 2009," *American Theatre* magazine (November 2010)
- *The Effect of the Economy on the Nonprofit Sector*, GuideStar (June 2010)
- *NPN survey* (2008)
- For the complete survey data, visit <http://tinyurl.com/36ukv2v> (Survey Monkey Web Link)

Credits

Funded by the Doris Duke Charitable Foundation

Compiled and analyzed by Kathie deNobriga

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Graphic design by Alice Teeter



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Survey

The National Performance Network has received a grant from the Doris Duke Charitable Foundation to partner with Alternate ROOTS, the Network of Ensemble Theaters and Artists, Creative Capital, The MAP Fund and the Consortium of Asian American Theaters and Artists to conduct an on-line survey of our member organizations and artists, to get current information on the impact of the economic recession on their work. NPN is a member of the Performing Arts Alliance and Grantmakers in the Arts and participates in other national forums for networks and service organizations. The data we collect through this survey will be an important advocacy tool for NPN to represent the circumstances of the arts sector included in this survey universe.

We estimate that this survey should take fewer than seven minutes to complete. Your answers will help us represent a sector of the contemporary arts community in the U.S. that is unlikely to be surveyed by larger service organizations. If you are an artist member of an organization, ensemble, collaborative, etc., you are encouraged to complete BOTH parts of the survey: the first half for your group and the second half for yourself as an individual. We appreciate your time!

*

1. ORGANIZATION, ENSEMBLE, INFORMAL COMPANY or ARTIST

Please self-identify, based on the following characteristics (check all that apply):

- | | | |
|---|--|---|
| <input type="checkbox"/> American Indian/Alaskan Native | <input type="checkbox"/> Rural | <input type="checkbox"/> High Income (> \$50K/annual) |
| <input type="checkbox"/> Asian/Asian-American | <input type="checkbox"/> Urban | <input type="checkbox"/> Teacher |
| <input type="checkbox"/> Black/African-American | <input type="checkbox"/> Suburban | <input type="checkbox"/> Student |
| <input type="checkbox"/> Hispanic/Latino | <input type="checkbox"/> Senior Citizen (65+) | <input type="checkbox"/> Artist |
| <input type="checkbox"/> Native Hawaiian/Pacific Islander | <input type="checkbox"/> Young Adult (18-30) | <input type="checkbox"/> Person with Disability |
| <input type="checkbox"/> White | <input type="checkbox"/> Low Income (< \$25K/annual) | <input type="checkbox"/> Lesbian, Gay, Bisexual, Queer, Transgender |
| <input type="checkbox"/> Multi-Racial | <input type="checkbox"/> Middle Income | |

2. LOCATION:

City/Town: _____ State: _____ Country: _____

3. AFFILIATIONS

Which organizations are you involved with (as a member, grantee or recipient of other services)?
Check all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Alternate ROOTS | <input type="checkbox"/> Consortium of Asian American Theaters and Artists |
| <input type="checkbox"/> Creative Capital | <input type="checkbox"/> National Performance Network |
| <input type="checkbox"/> The MAP Fund | <input type="checkbox"/> Network of Ensemble Theaters |
| <input type="checkbox"/> Other (please list): _____ | |

If you are answering this survey only as an individual artist, please skip to Question 14.

4. BUDGET SIZE

- 0-\$50,000
 \$50,001 - \$100,000
 \$100,001-\$250,000
 \$250,001-\$500,000
- \$500,001-\$1 million
 \$1-3 million
 Over \$3 million

Other/Comments _____

5. REVENUES/FUNDING

How does your current organizational situation compare to this time last year?

Increase/Exceeds Goal * Same * Decrease/Will Not Meet Goal * Not Applicable

- | | |
|--|--|
| • Overall | • Corporate Grants/Donations |
| • Local Government Grants | • Endowment Proceeds |
| • State Government Grants | • Memberships |
| • Federal Government Grants | • Special Events/Fundraisers |
| • Foundation Grants | • Ticket Sales and Other Earned Income |
| • Individual Contributions | • In-Kind |
| • Funds received as part of a larger institution | • Cash Reserve |

Other/Comments _____

6. BUDGET FLUCTUATIONS

Are your budget decreases/increases from year to year for reasons of choice or your creative cycle, having nothing to do with outside economic factors? Yes No

Comments _____

7. BUDGET

In your last Fiscal Year, did you have a Surplus Deficit

If yes, roughly how much was the surplus or deficit, expressed as a % of your budget? _____

8. CASH RESERVE

Cash Reserves (estimated) at end of last Fiscal Year: _____

Cash Reserves (estimated) at end of this Fiscal Year: _____

Other/Comments _____

9. PERSONNEL

How has your organization dealt with the economic downturn? Check all that apply

- | | |
|---|---|
| <input type="checkbox"/> Increased personnel | <input type="checkbox"/> Increase salaries |
| <input type="checkbox"/> Decreased personnel | <input type="checkbox"/> Decrease salaries/pay cuts |
| <input type="checkbox"/> Eliminated positions | <input type="checkbox"/> Increase benefits |
| <input type="checkbox"/> Volunteers cover positions that were formerly paid | <input type="checkbox"/> Decrease benefits |
| <input type="checkbox"/> Layoffs | <input type="checkbox"/> Eliminate benefits |
| <input type="checkbox"/> Furloughs | <input type="checkbox"/> Eliminate bonuses |
| <input type="checkbox"/> Hiring freezes | <input type="checkbox"/> No changes |

Other/Comments _____

10. ARTISTIC ACTIVITY

How has your artistic activity (exhibiting/producing/presenting) been affected by the economy? Check all that apply

- | | |
|--|---|
| <input type="checkbox"/> No changes | <input type="checkbox"/> Postponed activity |
| <input type="checkbox"/> Shorter or fewer engagements | <input type="checkbox"/> Decreased marketing |
| <input type="checkbox"/> Presenting more local artists or smaller groups | <input type="checkbox"/> Less rehearsal and/or development time |
| <input type="checkbox"/> Decreased activity in general | <input type="checkbox"/> More touring |
| <input type="checkbox"/> Paying smaller artist fees | <input type="checkbox"/> Less touring |
| <input type="checkbox"/> Change in marketing tactics (i.e., utilizing web, new communications) | <input type="checkbox"/> Fewer works created |
| <input type="checkbox"/> Increasing community partnerships/collaborations | <input type="checkbox"/> Hiatus |

Other/Comments _____

11. NEXTYEAR

How do you anticipate next Fiscal Year will be?

- | | | | |
|---------------------------------|-------------------------------|--------------------------------|---|
| <input type="checkbox"/> Better | <input type="checkbox"/> Same | <input type="checkbox"/> Worse | <input type="checkbox"/> We are in imminent danger of closing, and may not be around next year. |
|---------------------------------|-------------------------------|--------------------------------|---|

Other/Comments _____

12. General comments about your experiences or strategies in these economic times.

13. If you would like to receive a copy of the survey results when they are compiled, please provide an email address.

Thanks for your time. If you are not responding as both an organization and an individual artist, please click "next" and scroll to the bottom of the next page to submit your survey now. If you are responding as both an organization and an individual artist, please complete the next section.

Individual Artist Information

If you are an artist member of an organization, ensemble, collaborative, etc., you are encouraged to complete this section of the survey as well as the previous section of the survey.

14. EMPLOYMENT

Are you currently employed or contracted by a 501(c)(3) non-profit organization? Yes No

15. ARTISTIC INCOME

What percentage of your income comes from your artistic work?

- 0-24% 5-99%
 25-49% 100%
 50-74%

16. ARTISTIC INCOME

If your artistic income is less than 100%, what are your other sources of income?

- Spouse or other family member Investments
 Teaching Salary or freelance income from
 Consulting non arts-related work

Other (please specify) _____

17. ARTISTIC INCOME

What is your total annual income from your artistic work?

- Under \$5,000 \$40,001-\$50,000
 \$5,001 - \$10,000 \$50,001-\$75,000
 \$10,001 - \$20,000 \$75,001-\$100,000
 \$20,001 - \$30,000 Over \$100,000
 \$30,001-\$40,000

18. SOURCE OF ARTISTIC INCOME

Rank the sources of your artistic income/revenue from greatest (1) to least (7)

1. Government grants
2. Foundation Grants
3. Corporation Contracts
4. NPN Contracts
5. Other Arts Organization or Presenter Contracts, including Commissioning
6. School or College Contracts
7. Other Earned Income, Product Sales or Royalties

19. GROWTH/LOSS OF INCOME

Has your income from artistic work changed in the last year?

- Stayed about the same. Yes, it has increased. No, it has decreased.

20. GROWTH/LOSS OF INCOME

If your income has increased, by what percentage (roughly)? _____

If your income has decreased, by what percentage (roughly)? _____

How have you adjusted? (Comment _____)

21. HEALTH INSURANCE

Do you have health insurance?

- purchase your own health insurance independently through an individual plan
- purchase your own through a professional group
- have a day job/spouse/partner/family that provides some or all of your health insurance coverage
- do not have health insurance

22. ANNUAL EXPENDITURE FOR ARTISTS

If you employ artists (other than yourself), what is your annual average expenditure for artists?

- | | |
|--|---|
| <input type="checkbox"/> None | <input type="checkbox"/> \$25,001-\$50,000 |
| <input type="checkbox"/> Below \$5,000 | <input type="checkbox"/> \$50,001-\$75,000 |
| <input type="checkbox"/> \$5,001-10,000 | <input type="checkbox"/> More than \$75,000 |
| <input type="checkbox"/> \$10,001-\$25,000 | |

23. NEXTYEAR

How do you think next year will be, economically?

- Better Same Worse Other/Comments

24. General comments about your experiences or strategies in these economic times.

25. If you would like to receive a copy of the survey results when they are compiled, please provide an email address.

Thanks for your time.