

ROUGH WATERS SURVEY II

Results: prepared for public

The Rough Waters Survey is part of Dance/USA's effort to gauge the impact the recession is having on dance-based organizations in the United States. The first round of the Rough Waters Survey took responses from December 17, 2008 to January 13, 2009. As the economic challenges continued and reports of companies cutting costs in the face of an uncertain future rose, Dance/USA launched a second round of the Rough Waters Survey on April 7th, 2009 and accepted responses until May 1, 2009.

The second round of the survey was sent to member managers of dance-based organizations and member service organizations, who were invited to pass the survey along to their constituents. In all, 115 began the Rough Waters Survey II. 91 respondents completed the survey, resulting in a 79.1% completion rate. The demographics indicate that a similar grouping of dance-based organizations was collected in each round of the Rough Waters Survey. However, because the groups of respondents are not identical (just over one-third of second round respondents were confirmed as having also completed the first round of the Rough Waters Survey), the results are not directly comparable from one round of the survey to the next. Results can be interpreted to describe the experiences of some individuals and organizations in the field while providing a glimpse of a national perspective to compare to the headlines that dance-based organizations are making as a result of the economic turmoil.

Data drawn from the 91 completions demonstrates the following:

- 77 (84.6%) included revenue from ticket sales as part of plans. Of those, 35 reported that ticket sales have fallen short of plans by 5% or more.
- 79 (86.8%) included revenue from individual donations as part of plans. Of those, 48 reported that individual donations have fallen short of plans by 5% or more.
- 80 (87.9%) included revenue from foundation support as part of plans. Of those, 33 reported that foundation support has fallen short of plans by 5% or more.
- 66 (72.5%) included revenue from corporate support as a part of plans. Of those, 42 reported that corporate support has fallen short of plans by 5% or more.

As dance-based entities often receive funding from more than one source, combinations of revenue categories were examined. Based on the 91 completed responses:

- Nearly one-third of respondents, 29 (31.9%), have seen decreases in revenue from both individuals and corporations.
- One-fifth of respondents reported decreases in revenue in the following paired categories: ticket sales and individual donations; ticket sales and corporate support; corporate support and foundation support; and individual donations and foundation support.
- 6 (6.6%) respondents reported a decrease beyond 5% of plans in ticket sales, individual donations, foundation support, and corporate support.
- 3 (3.3%) respondents reported a decrease beyond 5% of plans in all revenue categories.

Respondents were asked to describe what kinds of actions they have taken to address the recession. 56% of all respondents have already implemented a contingency plan. Based on responses, most frequently mentioned elements of contingency plans include offering discounted tickets and changes in staffing (either by reducing staff numbers, wages, or hours).

In addition, respondents described how plans for the current season compare to plans for the upcoming season (beginning September 1, 2009). Responses were varied and included reports of:

- production decisions favoring popular works and avoiding risky performances;
- budgets that had been cut on all sides;
- staff and dancer layoffs; and
- waiting to see where the current season finishes before planning for the next one.

A few respondents indicated that their budgeting challenges began two years ago. As a result their plans for the upcoming season are more stable, and in some cases positive. Some individual dancemakers reported that their teaching endeavors have not been hurt by the recession.

Overall, the relative bleakness of the current season has not changed since January. More respondents were able to offer more specific responses to prompts about revenue for this, the second round of the Rough Waters Survey. However, the general message remains the same. There have been serious shortfalls and cutbacks already this year. Most have seen individual donations, corporate support, or both decrease. Many have seen ticket sales decline. A handful of dancemakers and dance presenters have seen improvements. There have been a few catastrophes. However, widespread collapse and panic is not the main concern for this year as many organizations are hanging on.

At this point, the level of uncertainty about the upcoming season remains high. Many of the decisions companies have made in this economy (e.g. cutting programming or not renewing dancer contracts) have affected not just the current season, but also the upcoming one. While operational challenges are likely to remain, the financial turmoil's impact on artistic decisions (e.g. programming decisions, creation of new work, and risk taking) will continue to unfold throughout the next season.