

SOUTHEASTERN CONNECTICUT CULTURAL COALITION

P.O. Box 95, New London, CT 06320 | (860) 448-5135 | info@CultureSECT.org | www.CultureSECT.org

May Update COVID-19 Impact Survey - RESULTS Southeastern CT's Arts & Cultural Organizations, Businesses & Artists

BACKGROUND

The Southeastern CT Cultural Coalition conducted a **May Update Survey** from May 19-31, 2020 as a follow-up to two earlier impact surveys conducted in March and April.

The survey request was distributed to our Partners and other stakeholders (2,000+ emails) to gather information about the status of operations in regional arts and cultural businesses and organizations, including the estimated economic impact of the COVID-19 public health emergency from **March 13 to June 30th**, and the government support relief options being pursued and received.

Responses came from **43** businesses/organizations/individuals from 15 different towns, with multiple responses in New London (9), Norwich (4), Stonington (11), Old Lyme (2), and Groton (4).

60% respondents from nonprofits, including performing & visual arts centers, theaters, museums, historic sites. 40% respondents from for-profit creative businesses and individual artists.

Most of those responding had also completed one of the previous Cultural Coalition impact surveys, updating their economic impact data from April 30 to now include May and June.

UPDATED RESULTS - SUMMARY

Economic Impact of Pandemic – between March 13 to June 30, 2020 (16 weeks)

- **\$16M in estimated total financial losses** (nonprofit and for profit arts & cultural sector)
- **700K estimated lost audience members, program attendees, or customers**
- At least 700 staff impacted by layoffs, furlough or reduced hours through April 30
- More than half of arts & cultural businesses cannot reopen in May (37%) or are uncertain about their ability to resume activities (21%) under the Phase I Reopening Guidelines
- **Currently, most (87%) arts & cultural businesses are doing Okay** – reporting fair, average, or good operational health now (end of May) and 75% predicting to be okay through summer (Sept. 2020)

DETAILS

Updated Economic Impact Data:

- \$15.9 Million estimated total financial losses March 13-June 30, 2020 (increase of approximately \$6.6M for May & June)
- 699,629 lost audience members, attendees, customers March 13-June 30, 2020 (increase of 441,357 members/audience/customers lost in May & June)

Phase I (May 20) Reopening Plans:

- **37% Cannot or will not reopen** or resume activities under the Phase I guidelines
- 28% Will reopen/resume activities or partially reopen/resume under the Phase I guidelines
- 21% Don't know or are unable to estimate if they will reopen under Phase I guidelines
- 14% Not applicable, as they have remained open or continued operations

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STATUS OF RELIEF FROM GOVERNMENT PROGRAMS

63% of respondents applied to Federal, State, Local Government Relief Programs (such as CT Dept. Labor Unemployment, Pandemic Unemployment, CARES Act PPP or EIDL, NEA, NEH, CT Office of the Arts grants, SBA Community Block grant)

Of those who applied to government programs, the majority (67%) anticipate that the relief received will only offset a small percentage of their total financial losses or they do not know what level of support to expect

Of those (27) who sought federal, state, local government relief:

- **37% anticipate receiving government support for 10-30% of their total financial loss**
- **30% do not know/cannot estimate the percentage of government support they will receive**
- 18% anticipate receiving government support for 40-60% of their total financial loss
- 11% anticipate receiving government support for 70-90% of their total financial loss
- 4% do not anticipate receiving any government support

Government Relief Option(s) Applied and Status (of 27):

CARES Act Paycheck Protection (PPP) & Pandemic Unemployment (PUA) among first support received

	# Applied/Plan to	# Received Funding	Don't Know/No Resp.
CT Dept. of Labor Unemployment Insurance (w-2)	6	2	3
CT PUA Pandemic Unemployment Assistance (1099, gig workers)	6	4 67%	2
CT Shared Work Program	2	1	1
CT Small Business Assistance Bridge Loan Program	3	1	2
CARES Act - Paycheck Protection Program (PPP)	15	11 73%	4
CARES Act - Expanded Economic Injury Disaster Loan (EIDL)	11	3	6 55%
CARES Act - Small Business Debt Relief Program (previous SBA loans)	2	0	0
NEA CARES Act Grant	5	0	4
NEH CARES Act Grant	7	0	5
Community Dev. Block Grant (CDBG) CARES Act	4	2	1
CT Office of the Arts – Artists Relief or Artists Respond	4	1	2
CT Office of the Arts CARES Act – Emergency Relief for CT Arts Orgs	1	0	0
CT Humanities CARES Act – Humanities Relief for CT Orgs	11	0	7
Other State Relief – CT Historic Preservation Stewardship	1	0	0

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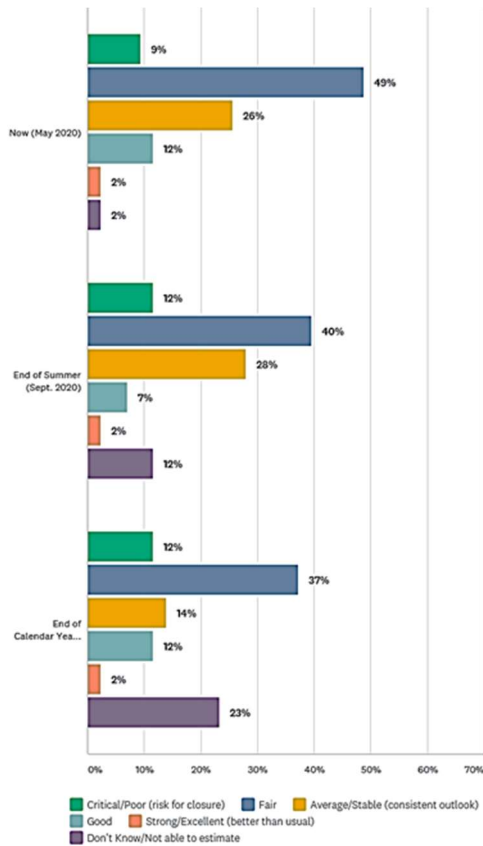
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OPERATIONAL HEALTH of organization/business (based on current situation/projections)

- As of now, **most (87%) arts & cultural entities are doing OK** - reporting Fair (49%), Average (26%) Good (12%) operational health and 75% expecting to keep at moderate levels to September
- Uncertainty of operations grows in the 3rd and 4th quarters, with 12% not able to estimate the level of health at the end of summer and 23% not able to predict the level for the end of the calendar year
- Organizations and businesses at a strong/excellent level (2%) or at a critical level (9%-12%) remains consistent over time from now to the end of the calendar year



	CRITICAL/POOR (RISK FOR CLOSURE)	FAIR	AVERAGE/STABLE (CONSISTENT OUTLOOK)	GOOD	STRONG/EXCELLENT (BETTER THAN USUAL)	DON'T KNOW/NOT ABLE TO ESTIMATE
Now (May 2020)	9% 4	49% 21	26% 11	12% 5	2% 1	2% 1
End of Summer (Sept. 2020)	12% 5	40% 17	28% 12	7% 3	2% 1	12% 5
End of Calendar Year (Dec. 2020)	12% 5	37% 16	14% 6	12% 5	2% 1	23% 10

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