

2022 Chorus Operations Survey Report



SMU DataArts

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Rebecca Roscoe

Research Specialist, SMU DataArts

2022 CHORUS OPERATIONS SURVEY REPORT

The 2022 Chorus Operations Survey Report sheds light on how the choral field has managed an unprecedented crisis and points to the road ahead. This report highlights the significant impacts that the COVID-19 pandemic has had on choruses' budgets – impacts that are consistent with what is being seen across the arts and culture sector generally. While the choruses that contributed data ended fiscal year 2020/21 in an overall healthy financial position, the report leaves no doubt that our field faces a period of regrowth and rebalancing.

Chorus's budgets are significantly smaller today than in years past. Comparing budget sizes from this year's report to the 2020 report, 29 choruses experienced a shift into a smaller budget category. This year's report, for the first time, also offers a trend analysis that tracks the operating budgets of 55 choruses that submitted data over the past four years. The analysis shows that total operating revenue decreased 14% between fiscal year 2019 and fiscal year 2021.

Today's chorus budgets also rely far more on contributed revenue than earned revenue. Choruses have always had a slightly higher ratio of contributed to earned revenue than the 50/50 split that arts organizations generally reported pre-pandemic, and this gap has grown significantly. This report shows that for fiscal year 2020/21, a typical chorus's revenue breakdown might look like raising 78% of revenue through contributed sources, 11% through earned sources, and 11% through investments. This is largely due to an increase in revenue from government sources, thanks to the federal and local relief funding that many choruses received.

New to this year's report, SMU DataArts' streamlined Cultural Data Profile allows in-depth reporting on digital and in-person offerings, including attendance numbers for each. Almost all distinct performances reported were digital, with over half of chorus programming offered as on-demand productions or programs that could be viewed anytime. Even as choruses resume more in-person activities, measuring and benchmarking the impact of digital programming will continue to be important for demonstrating overall impact.

Looking ahead, our field faces some important questions. How should choruses budget to accommodate continued pandemic-related challenges as relief funding comes to an end? How can they sustain support from donors while continuing to seek out new earned revenue opportunities? What programming – whether in-person or digital – can best engage and rebuild audiences?

Together, we'll draw on the commitment to mission, innovation, and resourcefulness our field has shown, along with resources like the data in this report, to inform the work ahead.



Catherine Dehoney

President and CEO, Chorus America

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EXECUTIVE SUMMARY

This analysis provides summaries of key metrics for choruses who completed the Cultural Data Profile and the Chorus Operations Survey. Metrics are presented in both snapshot as well as trend tables and charts.

Chorus data in the financial summary sections include information from choruses who have entered financial and programmatic data into the online data collection system of SMU DataArts (formerly the Cultural Data Project), an independent nonprofit organization, as well as the custom survey module for Chorus America. For the 107 choruses in the dataset, SMU DataArts used the latest Cultural Data Profiles (FY2020 or FY2021) available as of May 2022.

Trend sections answer questions around fluctuations in budget, as well as how well choruses were able to sustain contributed revenue during the pandemic. New questions added to the Chorus Operations Survey module inform us of funding assistance received from government sources. In addition, the streamlined Cultural Data Profile now allows for more robust analysis of digital programming.

Below are the key insights from this report.

- Since the pandemic, there has been a 3% increase in contributed revenue across the arts and culture sector¹. For choruses analyzed, the most significant types of funding are individual support (36%), followed by foundation contributions (16%). Fourteen percent of total revenue came from government sources in 2020/21. Increases were recognized in government support while individual contributions and foundation support remained fairly steady.
- Total operating revenue experienced a 14% decrease from fiscal year 2019 to 2021. Earned revenue plummeted in 2021 as choruses paused programming. Contributed revenue saw a 19% increase from 2019 to 2021, when much of the federal relief funding was received.
- Seventy-nine percent of choruses received some level of federal or other government relief funding since the start of COVID-19.
- Choruses analyzed reduced their expenses by 35% from fiscal year 2019 to 2021. Small and mid-sized choruses greatly reduced their expenses. Overall, choruses ended fiscal year 2020/21 with a 15% unrestricted surplus.
- Nearly two-thirds (65%) of choruses analyzed reported at least one full or part-time paid staff person. During the pandemic, choruses were relatively successful in retaining full-time staff.
- Eighty-five percent of choruses modified their program delivery in 2020/21. Over half of chorus programming in 2020/21 came from distinct on-demand productions or programs.

¹Fonner, Daniel, *Studying Early Pandemic Data: Did Giving Sustain the Arts?*, SMU DataArts, March 2022
<https://culturaldata.org/the-arts-in-recovery-blog-series/unrestricted-contributed-revenue-in-2020/>

CHORUS OPERATIONS SURVEY: INTRODUCTION

The first section of this report reviews key metrics for choruses who completed the Cultural Data Profile as well as the Chorus Operations Survey. These findings present a “snapshot” or one-year analysis to capture the broadest view of choruses. Choruses were instructed to enter data for fiscal year 2020 or 2021, depending on when their fiscal year ended. The snapshot findings represent surveys with fiscal year-end dates between October 1, 2020 and September 20, 2021.

New to this year’s report, we will be assessing trend data for revenue, expenses, and programming activities from fiscal years 2018 through 2021. These trend analysis sections will allow us to better understand how the revenue and expense makeup among choruses has shifted since the pre-pandemic era, and can allow for forecasting and planning for future years.

In this analysis, there is a self-selection and resource bias: this section of the report is based only on choruses who choose to and have the resources to complete the lengthy SMU DataArts Cultural Data Profile and Chorus Operations Survey add-on. The SMU DataArts system does have an abbreviated form for organizations under \$50,000, and organizations below this threshold are asked fewer than 60 questions.

THE SURVEY POPULATION

The data for this report was collected via SMU DataArts Cultural Data Profile throughout the first quarter of 2022. In total, 107 chorus organizations completed the Cultural Data Profile with the Chorus Operations Survey add-on. For this year's analysis, **34% of responding choruses are new to completing the Chorus Operations Survey**. The 107 choruses represent three main constituency types and seven budget categories². This year's dataset sees higher representation of smaller choruses with budgets under \$250,000 as shown in Table 1. This is in part due to many choruses decreasing their expenditures in fiscal year 2020/21. Comparing budget sizes from this year's report to the 2020 report, which reflected fiscal year 2018/19 data, 29 choruses experienced a shift into a smaller budget category.

TABLE 1

Breakdown of Choruses by Budget Size

| | Count | Column N % |
|-----------------------|------------|-------------|
| Under \$50,000 | 32 | 30% |
| \$50,000 - \$99,999 | 15 | 14% |
| \$100,000 - \$149,999 | 12 | 11% |
| \$150,000 - \$249,999 | 11 | 10% |
| \$250,000 - \$499,999 | 11 | 10% |
| \$500,000 - \$999,999 | 10 | 9% |
| \$1 million and over | 16 | 15% |
| TOTAL | 107 | 100% |

Similar to past years' analysis, volunteer choruses represent more than half of all respondents as shown in Table 2.

TABLE 2

Breakdown of Choruses by Constituency Type

| | Count | Column N % |
|---|------------|-------------|
| Children/Youth Chorus <i>Including 1 umbrella chorus</i> | 17 | 16% |
| Professional Chorus <i>Including 3 umbrella choruses</i> | 24 | 22% |
| Volunteer Chorus <i>Including 9 umbrella choruses</i> | 66 | 62% |
| TOTAL | 107 | 100% |

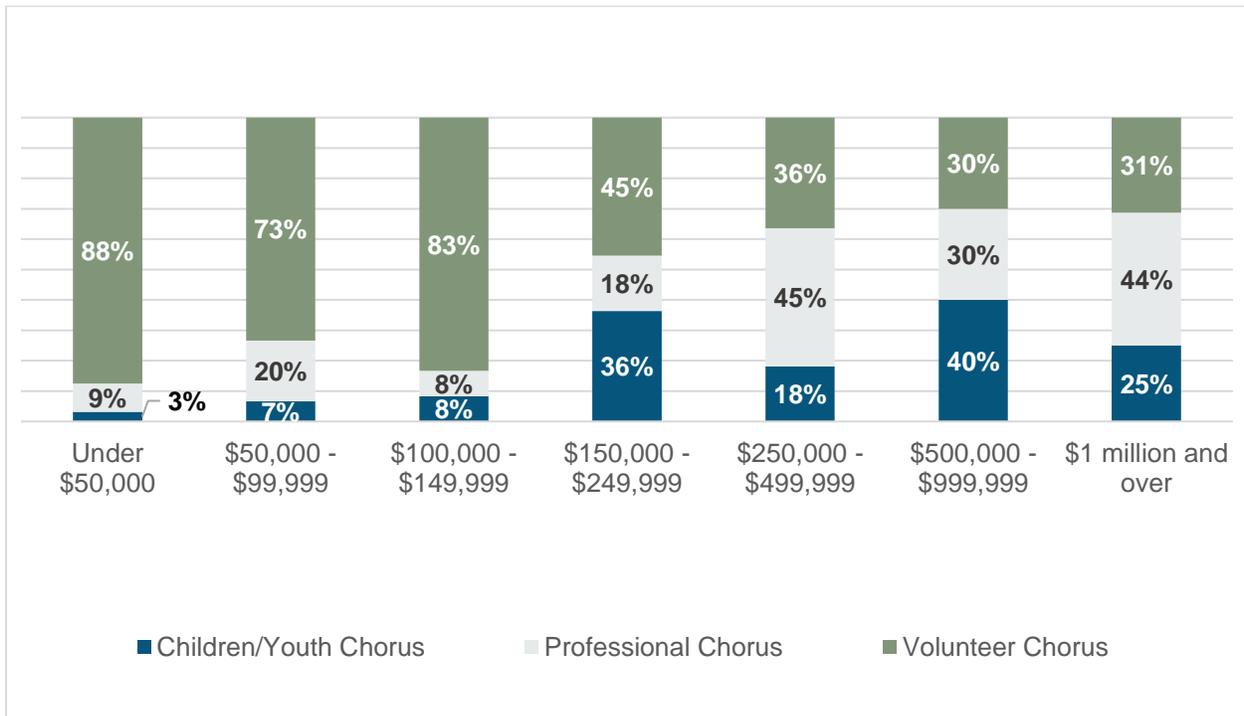
² Constituency type classifications are self-reported. Budget size is based on total expenses as reported in the Cultural Data Profile.

Fourteen choruses responded as Umbrella Choruses, meaning they considered their chorus to be made up of multiple ensembles from different membership categories. Umbrella choruses were asked to answer an additional question in the survey asking for the category that best describes their primary chorus.

The general breakdowns shown in Tables 1 and 2 are combined to show representativeness of chorus constituency types by budget groupings in Figure 1 below.

FIGURE 1

Constituency Type by Budget Size



New to this year's report, we will be assessing trend data for revenue, expenses, and programming activities from fiscal years 2018 through 2021. Note that trend analyses look only at choruses who submitted data for all four years. Trend sections represent 55 choruses. As the trend dataset is smaller, budget categories are condensed into three buckets: Under \$150,000, \$150,000-\$499,999, and over \$500,000 as shown in Table 3. The breakdown of these 55 choruses is below.

TABLE 3

Breakdown of Choruses by Budget Size

| | Count | Column N % |
|-----------------------|-----------|-------------|
| Under \$150,000 | 29 | 53% |
| \$150,000 - \$499,999 | 12 | 22% |
| \$500,000 and over | 14 | 25% |
| TOTAL | 55 | 100% |

The trend dataset has a higher representation of Children/Youth choruses and fewer Volunteer choruses than the standard dataset for this year's analysis.

TABLE 4

Breakdown of Choruses by Constituency Type

| | Count | Column N % |
|-----------------------|-----------|-------------|
| Children/Youth Chorus | 14 | 25% |
| Professional Chorus | 12 | 22% |
| Volunteer Chorus | 29 | 53% |
| TOTAL | 55 | 100% |

COMMON CHORUS ATTRIBUTES

This section is a top-level view of important financial and operational issues across the three types and seven budget categories. For many of these items, further detail will be provided in later sections. This year, we also included additional rows representing average digital paid attendees as well as average staff turnover

Tables 5 and 6 below look at group averages (mean) for the different chorus constituency and budget categories, with data for all respondents in the first column.

TABLE 5

Chorus Attributes by Constituency Type (averages)

| | Mean - Overall | Children/Youth Chorus | Professional Chorus | Volunteer Chorus |
|---|----------------|-----------------------|---------------------|------------------|
| | | Mean | Mean | Mean |
| Organizations Year Founded | 1972 | 1984 | 1978 | 1967 |
| Number of Singers | 109 | 245 | 72 | 87 |
| Number of Board Member Singers | 5 | 3 | 1 | 7 |
| Total In-Person Paid Attendees | 226 | 152 | 421 | 170 |
| Total Digital Paid Attendees | 724 | 1,781 | 1,383 | 218 |
| Total Presented/Produced Productions Distinct (In-Person & Digital) | 13 | 13 | 25 | 9 |
| Ticket Price Range High | \$25.49 | \$13.00 | \$32.52 | \$25.98 |
| Ticket Price Range Low | \$8.50 | \$5.50 | \$8.38 | \$9.31 |
| Total Earned Revenue Operating | \$63,248 | \$176,870 | \$63,606 | \$33,399 |
| Total Operating Revenue | \$612,681 | \$849,147 | \$1,348,427 | \$279,177 |
| Earned Share of Operating Revenue | 9% | 21% | 5% | 8% |
| Marketing Expense as Percent of Total Expenses | 8% | 6% | 7% | 8% |
| Total Operating Expenses Program | \$294,973 | \$454,999 | \$522,630 | \$170,970 |
| Total Operating Expenses Fundraising | \$56,685 | \$103,692 | \$115,202 | \$21,332 |
| Total Operating Expenses General/Administrative | \$102,444 | \$155,295 | \$200,198 | \$53,284 |
| Total Operating Expenses | \$450,924 | \$707,887 | \$838,031 | \$243,970 |
| Total Operating Expenses Program | 63% | 62% | 67% | 63% |
| Total Operating Expenses Fundraising | 6% | 9% | 9% | 5% |
| Total Operating Expenses General/Administrative | 30% | 30% | 24% | 33% |
| Full-Time Employees Permanent | 2.9 | 5 | 5 | 1 |
| Part-Time Employees Permanent | 6 | 7 | 17 | 2 |
| Staff Turnover | 1 | 2 | 1 | 1 |
| Board Members Number | 13 | 14 | 16 | 12 |

TABLE 6

Chorus Attributes by Budget Size (averages)

| | Mean - Overall | Under \$50,000 | \$50,000 - \$99,999 | \$100,000 - \$149,999 | \$150,000 - \$249,999 | \$250,000 - \$499,999 | \$500,000 - \$999,999 | \$1 million and over |
|---|------------------|----------------|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------|
| | | Mean | Mean | Mean | Mean | Mean | Mean | Mean |
| Organizations Year Founded | 1972 | 1987 | 1968 | 1959 | 1982 | 1966 | 1980 | 1951 |
| Number of Singers | 109 | 51 | 60 | 82 | 101 | 120 | 138 | 272 |
| Number of Board Member Singers | 5 | 6 | 6 | 7 | 4 | 3 | 2 | 5 |
| Total In-Person Paid Attendees | 226 | 62 | 42 | 86 | 28 | 191 | 416 | 835 |
| Total Digital Paid Attendees | 724 | 33 | 109 | 887 | 129 | 116 | 1,641 | 2,919 |
| Total Presented/Produced Productions Distinct (In-Person & Digital) | 13 | 5 | 9 | 10 | 8 | 43 | 10 | 20 |
| Performances Ticket Price Range High | \$25.49 | \$18.24 | \$30.83 | \$16.00 | \$21.00 | \$14.70 | \$31.00 | \$48.00 |
| Performances Ticket Price Range Low | \$8.50 | \$8.40 | \$5.17 | \$10.30 | \$8.50 | \$6.00 | \$10.89 | \$10.50 |
| Total Earned Revenue Operating | \$63,248 | \$3,994 | \$13,115 | \$13,033 | \$30,098 | \$55,790 | \$143,478 | \$240,484 |
| Total Operating Revenue | \$612,681 | \$38,906 | \$91,269 | \$190,874 | \$241,538 | \$492,834 | \$879,060 | \$2,700,623 |
| Earned Share of Operating Revenue | 9% | 10% | 14% | 7% | 12% | 11% | 16% | 7% |
| Marketing Expense as Percent of Total Expenses | 8% | 10% | 14% | 7% | 12% | 11% | 16% | 7% |
| Total Operating Expenses Program | \$294,973 | \$16,600 | \$47,511 | \$87,893 | \$122,487 | \$229,533 | \$483,075 | \$1,284,976 |
| Total Operating Expenses Fundraising | \$56,685 | \$1,440 | \$2,407 | \$4,628 | \$12,027 | \$28,832 | \$58,660 | \$287,047 |
| Total Operating Expenses General/Administrative | \$102,444 | \$9,616 | \$24,200 | \$31,109 | \$69,031 | \$111,590 | \$141,274 | \$407,372 |
| Total Operating Expenses | \$450,924 | \$27,596 | \$73,957 | \$123,629 | \$200,265 | \$369,956 | \$683,009 | \$1,979,396 |
| Total Operating Expenses Program | 63% | 57% | 65% | 70% | 62% | 63% | 70% | 66% |
| Total Operating Expenses Fundraising | 6% | 5% | 3% | 4% | 4% | 8% | 9% | 13% |
| Total Operating Expenses General/Administrative | 30% | 38% | 32% | 26% | 33% | 30% | 21% | 21% |
| Full-Time Employees Permanent | 3 | 0 | 0 | 0 | 1 | 2 | 3 | 9 |
| Part-Time Employees Permanent | 6 | 1 | 6 | 2 | 3 | 7 | 4 | 8 |
| Staff Turnover | 1 | 0 | 0 | 0 | 0 | 3 | 1 | 2 |
| Board Members Number | 13 | 9 | 10 | 12 | 12 | 12 | 15 | 24 |

OPERATING FINANCES

The following information is taken from the Cultural Data Profile (CDP) as well as the Chorus Operations Survey, which asked for details around government relief funding. SMU DataArts tracks revenue diversity across several lines in the Cultural Data Profile. These line items are then bucketed for analysis, allowing one to have a better picture of the types of revenue or expenses a grouping of organizations may have. New to this year's report, we are also comparing revenue and expense trends across choruses who have historically provided information. Trend analysis reflects data submitted for fiscal years 2018 to 2021 for 55 organizations. Note that change reflects nominal change, as figures were not adjusted for inflation. We will also compare some findings from the 2020 report around projected revenue losses and adjustments due to the pandemic with actual data. Projected loss data comes from the COVID-19 Impact Survey distributed by Chorus America, which collected responses from choruses in the Spring of 2020.

Revenue

In Tables 5 and 6 in the prior section, average total operating revenue is shown as \$612,681. Since the average budget size skews towards larger-sized organizations, median total operating revenue by budget size and chorus constituency type is shown below in Tables 7 and 8. **Across the 107 organizations analyzed, median total operating revenue is \$155,525.** For choruses under \$50,000 the median total operating revenue is \$38,142.

TABLE 7

Median Operating Revenue by Budget Size

| Overall | Under \$50,000 | \$50,000 - \$99,999 | \$100,000 - \$149,999 | \$150,000 - \$249,999 | \$250,000 - \$499,999 | \$500,000 - \$999,999 | \$1 million and over |
|-----------|----------------|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------|
| \$155,525 | \$38,142 | \$86,954 | \$166,356 | \$242,509 | \$388,950 | \$748,754 | \$2,080,402 |

TABLE 8

Median Operating Revenue by Constituency Type

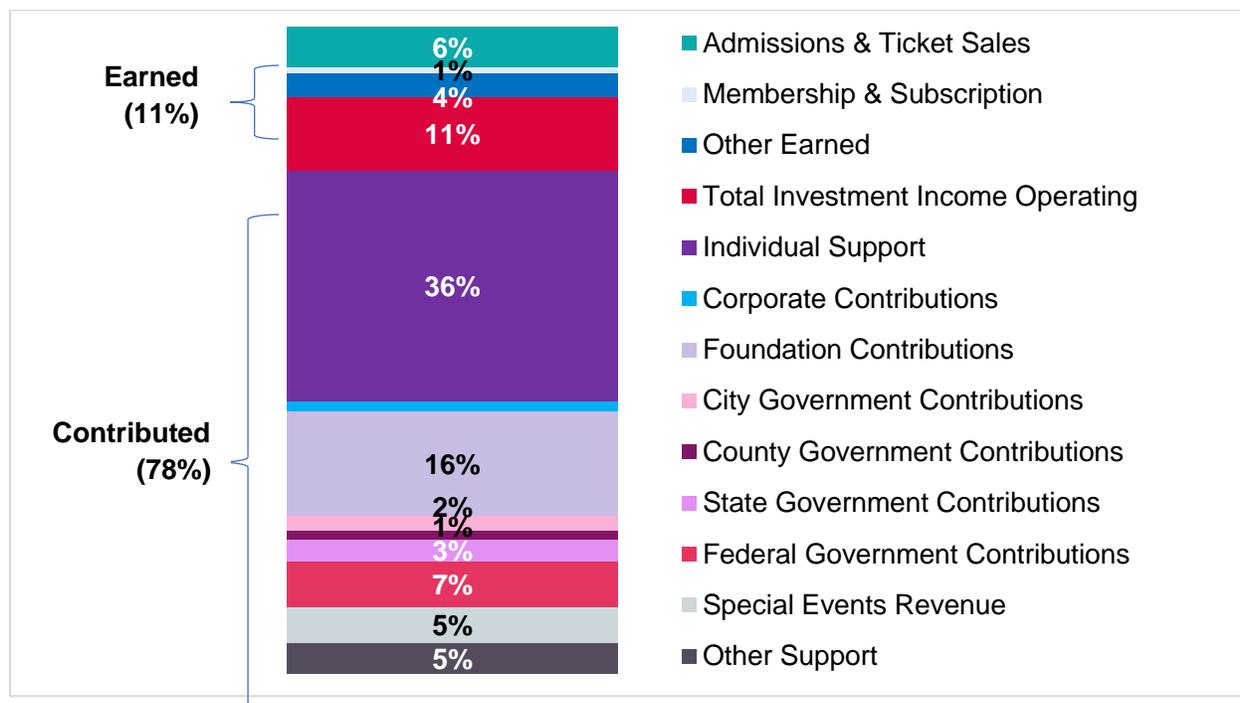
| Overall | Children/Youth Chorus | Professional Chorus | Volunteer Chorus |
|-----------|-----------------------|---------------------|------------------|
| \$155,525 | \$484,998 | \$450,852 | \$91,935 |

For the analysis of the 107 Chorus America organizations, **the revenue picture for FY2020/21 for choruses is one in which a chorus raised 78% of revenue through Contributed sources, 11% through Earned sources, and 11% through Investments.** This can be compared to the FY2018/19 report where choruses raised 57% of revenue through contributed

sources and 38% from earned sources. Generally speaking, arts and culture organizations had a 50/50 split between earned and contributed revenue before the onset of the COVID-19 pandemic. **Since the pandemic, there has been a sector-wide 3% increase in contributed revenue.** Increases were seen in all types of contributed revenue, except trustee and corporate support. We will further explore shifts in revenue models in the following sections. A full breakdown of revenue types is shown in Figure 2 below.

FIGURE 2

Overall Revenue by Source



Overall, the most significant types of funding across the dataset are individual support (36%), followed by foundation contributions (16%). In a 2020 insights report published by TRG Arts, building and maintaining relationships with loyal audiences is seen as an important method for weathering the impacts of COVID-19³. The reliance on individual donor support has historically been important to choruses, representing 28% of choruses’ overall revenue picture in 2018/19. **Fourteen percent of total revenue came from government sources in fiscal years 2020/21 compared to 4% in fiscal year 2018/19. Half of this government support comes from federal sources.** We will explore federal relief funding later in this report.

³ COVID-19 Sector Benchmark Insight Report. May 2020
https://culturaldata.org/media/2103/covid-19-insight_report-i.pdf

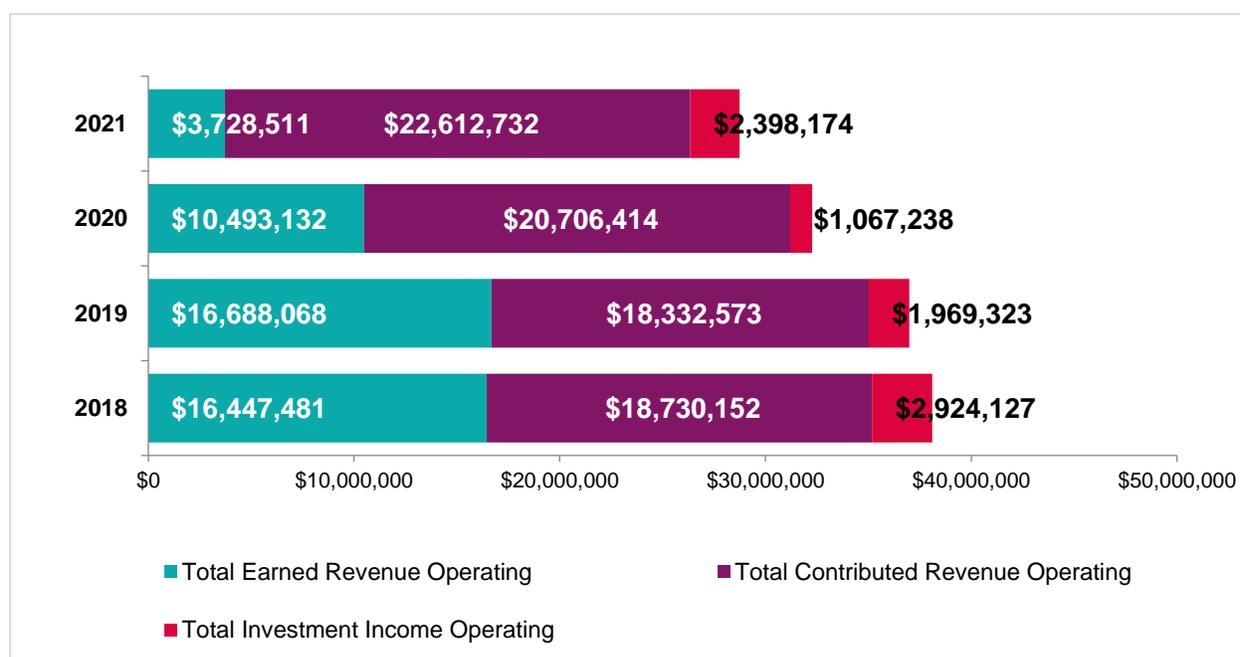
The COVID-19 Sector Benchmark Dashboard was developed by TRG Arts in collaboration with U.K.-based audience analytics company Purple Seven, launched in early April 2020.

Trend Analysis: How Much Did Chorus's Budgets Fluctuate from 2018 to 2021?

The COVID-19 pandemic has turned the arts and culture sector upside down in many ways. With widescale closures beginning in March 2020, organizations saw steep drops in earned revenue from tickets and admissions. However, they found some relief through government funding programs, as well as adjusted grant terms that allowed for some restriction removal or reallocation of funds to general operating needs⁴. Figure 3 below shows change over time for the sum total of operating revenue across the 55 choruses in the trend dataset, as well as the breakout of earned, contributed, and investment revenue.

FIGURE 3

Nominal Change in Revenue by Revenue Type, 2018-2021



Without adjusting for inflation, total operating revenue experienced a 14% decrease from fiscal year 2019 to 2021. Earned revenue as a percent of total operating revenue plummeted in 2021 as choruses paused programming. Contributed revenue saw a 19% increase from 2019 to 2021, when federal relief funding was distributed. Figures 4, 5, and 6 below show these trends by budget size.

For the purposes of trend analysis, we have condensed the standard seven budget categories into three buckets: Under \$150,000, \$150,000-\$499,999, and over \$500,000.

⁴ Fonner, Daniel, *Studying Early Pandemic Data: Did Giving Sustain the Arts?*, SMU DataArts, March 2022 <https://culturaldata.org/the-arts-in-recovery-blog-series/unrestricted-contributed-revenue-in-2020/>

FIGURE 4

Nominal Change in Revenue by Revenue Type, 2018-2021
Under \$150,000 Budget Size

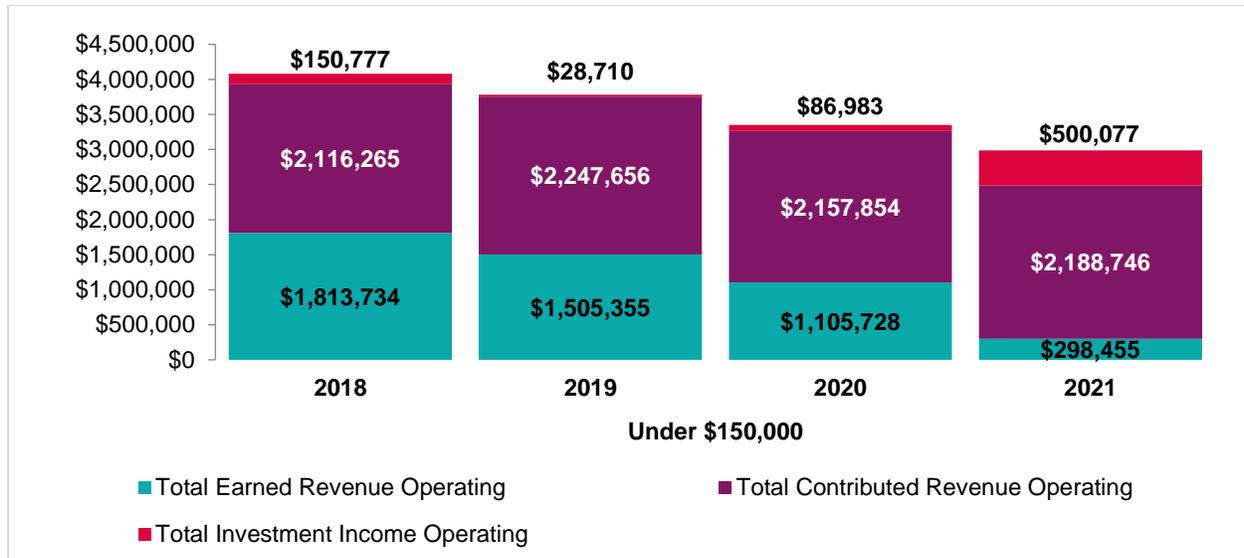


Figure 4 shows a slight decrease in total contributed revenue among from fiscal year 2019 to 2020/2021. This is compared to figures 5 and 6 below, which indicate an increase in total contributed revenue, particularly in fiscal year 2021 when federal funding was distributed.

FIGURE 5

Nominal Change in Revenue by Revenue Type, 2018-2021
\$150,000-\$499,999 Budget Size

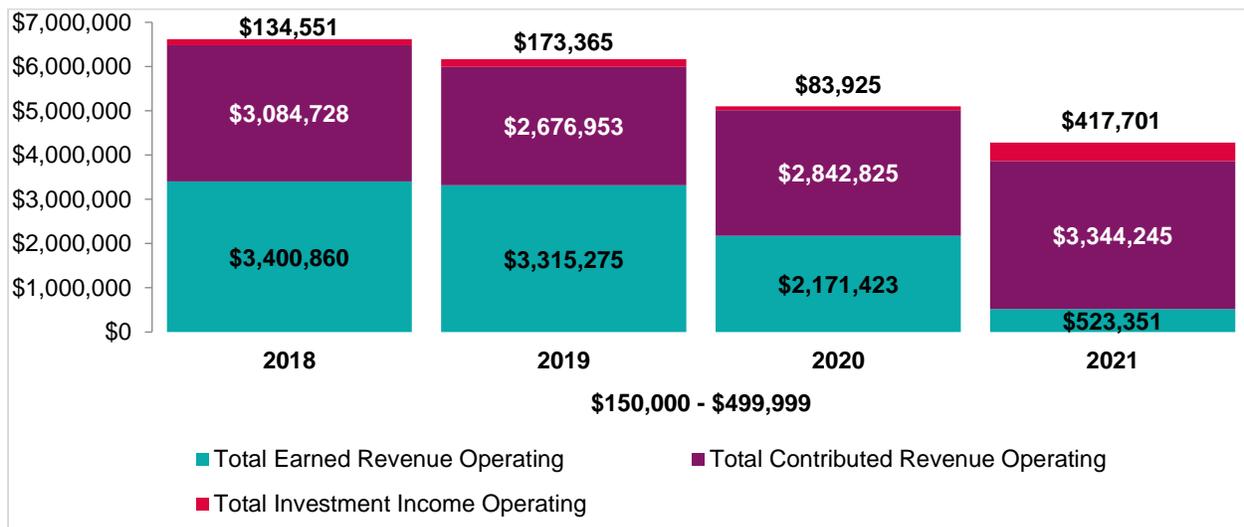
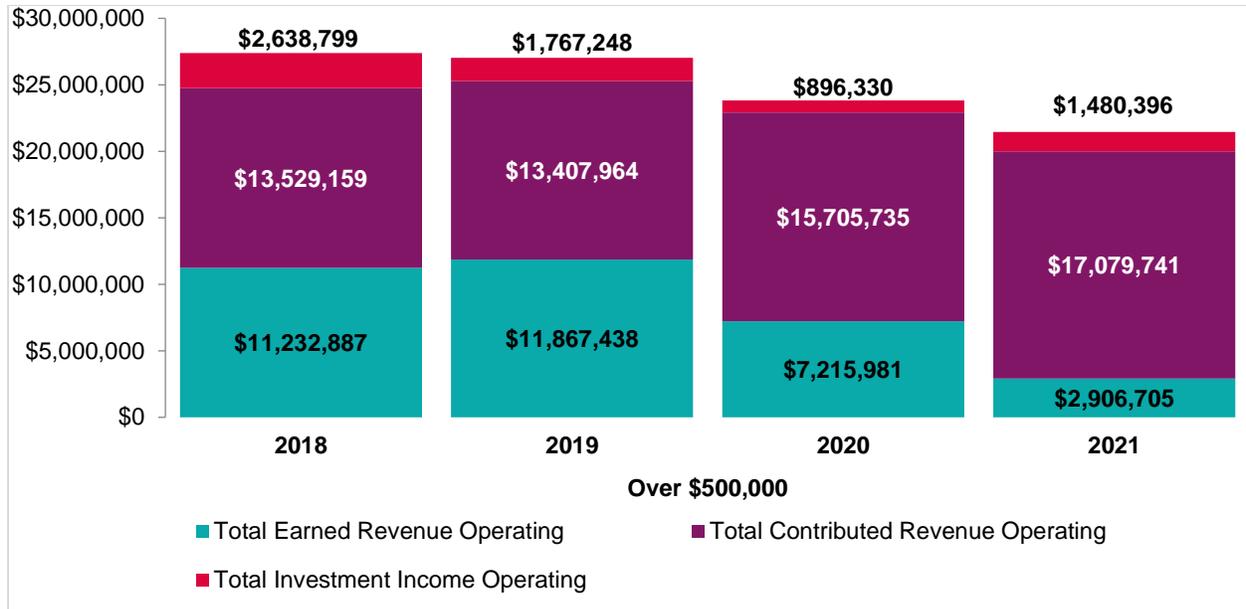


FIGURE 6

Nominal Change in Revenue by Revenue Type, 2018-2021
Over \$500,000 Budget Size

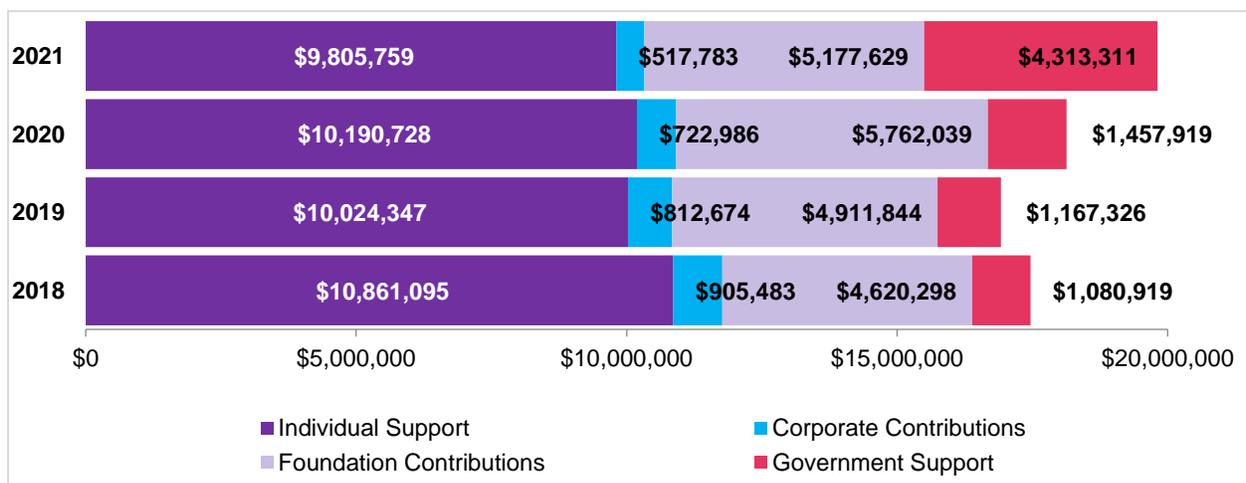


What Contributed Revenue Sources Helped Choruses?

Figure 7 below displays trends in contributed revenue diversity from four primary sources: individual and trustee donations, corporations, foundations, and public agencies at all levels of government.

FIGURE 7

Nominal Change in Contributed Revenue Sources, 2018-2021



Significant increases were seen in government support, while individual contributions and foundation support remained fairly steady. Corporate donations, only representing a small percentage of contributed income, decreased in fiscal years 2020 and 2021. While the overall values are helpful in understanding the choral sample as a whole, examining the dataset by budget size can shed light on differences experienced within the sample. Table 9 below displays individual, foundation, government, and corporate contributed revenue changes over time by budget size.

TABLE 9

Nominal Change in Contributed Revenue Sources, 2018-2021 by Budget Size

| Individual Support | 2018 | 2019 | 2020 | 2021 | Nominal change % 2019 - 21 |
|-----------------------|--------------|--------------|--------------|--------------|-------------------------------|
| Under \$150,000 | \$ 1,380,770 | \$ 1,436,448 | \$ 1,215,735 | \$ 1,198,938 | -20% |
| \$150,000 - \$499,999 | \$ 1,720,607 | \$ 1,338,758 | \$ 1,438,818 | \$ 1,195,550 | -12% |
| Over \$500,000 | \$ 7,759,718 | \$ 7,249,141 | \$ 7,536,175 | \$ 7,411,271 | 2% |

| Corporate Support | 2018 | 2019 | 2020 | 2021 | Nominal change % 2019 - 21 |
|-----------------------|------------|------------|------------|------------|-------------------------------|
| Under \$150,000 | \$ 67,238 | \$ 55,973 | \$ 60,964 | \$ 71,041 | 21% |
| \$150,000 - \$499,999 | \$ 93,078 | \$ 73,628 | \$ 80,221 | \$ 63,176 | -17% |
| Over \$500,000 | \$ 745,167 | \$ 683,073 | \$ 581,801 | \$ 383,566 | -78% |

| Foundation Support | 2018 | 2019 | 2020 | 2021 | Nominal change % 2019 - 21 |
|-----------------------|--------------|--------------|--------------|--------------|-------------------------------|
| Under \$150,000 | \$ 210,975 | \$ 242,054 | \$ 309,028 | \$ 241,699 | 0% |
| \$150,000 - \$499,999 | \$ 923,810 | \$ 821,763 | \$ 724,389 | \$ 975,094 | 16% |
| Over \$500,000 | \$ 3,485,513 | \$ 3,848,027 | \$ 4,728,622 | \$ 3,960,836 | 3% |

| Government Support | 2018 | 2019 | 2020 | 2021 | Nominal change % 2019 - 21 |
|-----------------------|------------|------------|------------|--------------|-------------------------------|
| Under \$150,000 | \$ 268,715 | \$ 327,404 | \$ 385,928 | \$ 548,944 | 40% |
| \$150,000 - \$499,999 | \$ 172,495 | \$ 225,710 | \$ 271,263 | \$ 866,193 | 74% |
| Over \$500,000 | \$ 639,709 | \$ 614,212 | \$ 800,728 | \$ 2,898,174 | 79% |

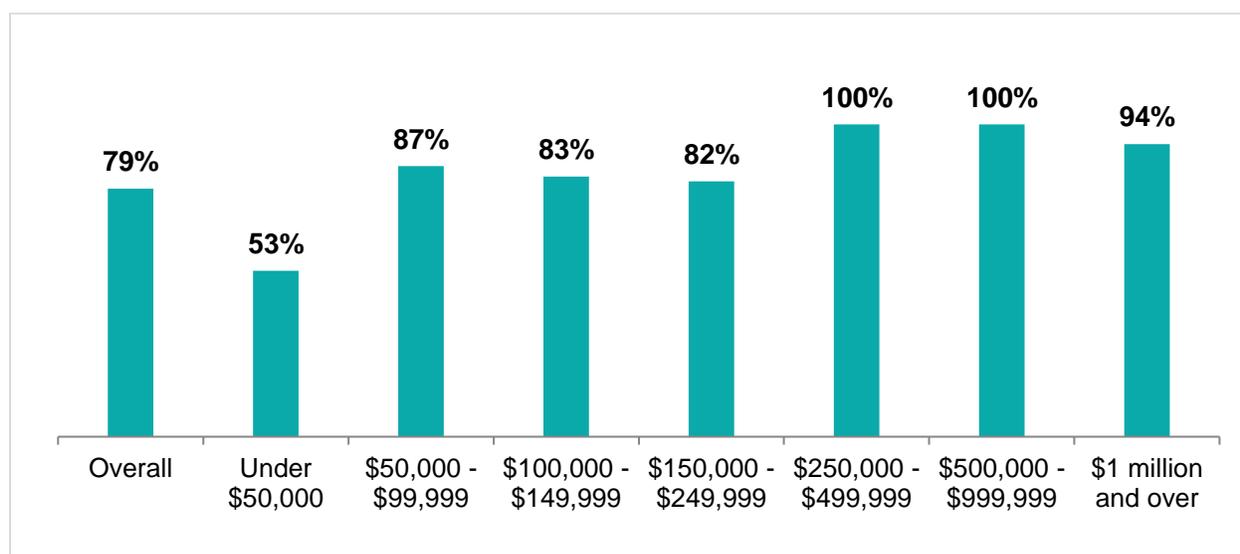
As seen in the previous section, we know that small sized choruses heavily rely on individual donations compared to larger choruses. **Over the course of the past four years, these small choruses saw a significant decrease in individual contributed revenue. The larger choruses saw an increase in government support – these changes may reflect the internal resources large choruses have in maintaining donor relationships and applying for government funding relative to the pandemic.** The following section explores who received government funds.

Government Relief Funding

We know from previous reports that choruses lean more on contributed revenue sources, more so than other types of arts and culture organizations. This dependency is even more apparent in fiscal year 2020/21, when choruses experienced contributed revenue growth due to federal government relief programs funded by the CARES Act⁵. Through these programs, many businesses and nonprofit arts and cultural organizations were able to secure funding to sustain employment levels and business operations⁶. As the previous section states, budget size is an indicator of how much government support increased during the pandemic. **All budget sizes saw significant growth in government funding; however, it was the larger sized choruses that saw the largest spike in government support.** Figures 8 and 9 below show the percent of choruses reporting having received some level of government relief funding.

FIGURE 8

Did your organization benefit from any federal or other government relief funding programs launched since the start of COVID-19?
(Percent indicating, by Budget Size)



⁵ For more information on the CARES Act see

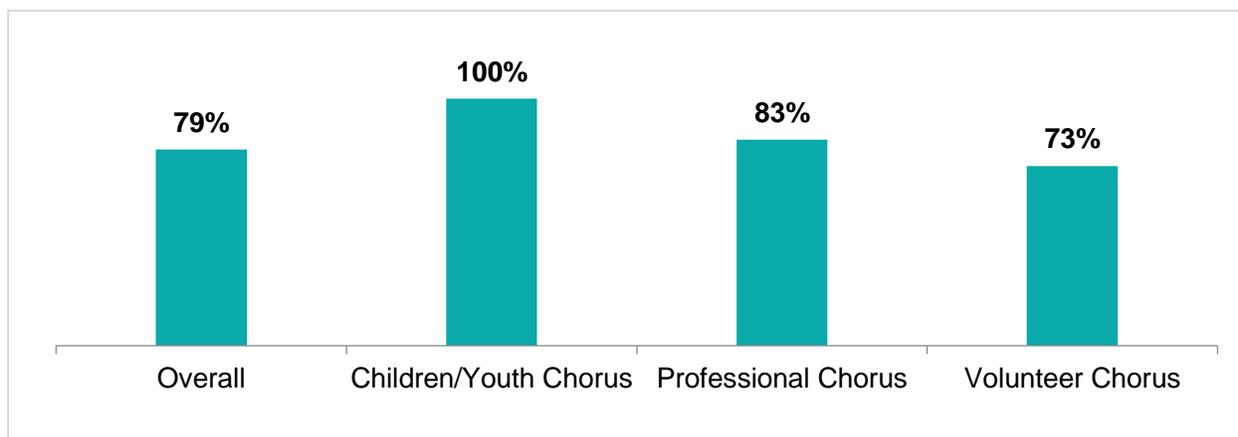
<https://www.investopedia.com/coronavirus-aid-relief-and-economic-security-cares-act-4800707>

⁶ Fonner, Daniel, *Studying Early Pandemic Data: Which Funding Sources Stepped Up for the Arts?* SMU DataArts, March 2022

<https://culturaldata.org/the-arts-in-recovery-blog-series/contributed-revenue-sources-2020/>

FIGURE 9

Did your organization benefit from any federal or other government relief funding programs launched since the start of COVID-19?
(Percent indicating, by Constituency Type)



Seventy-nine percent of choruses received some level of federal or other government relief funding since the start of COVID-19. Most of this support came through localized funding at the state, county, or city level and through the Paycheck Protection Program (PPP) loans.

This can be compared to the survey data collected during the spring of 2020 by Chorus America in their COVID-19 Impact Survey, which asked respondents to indicate whether they expected to receive any benefits from federal or other relief programs launched since the onset of COVID-19. The 2020 survey findings revealed that fewer than a quarter of responding choruses *expected* to receive this type of funding. Very small choruses in particular were unlikely to indicate in the 2020 survey that they expected federal relief funding in 2020.

Forty-two percent of professional choruses received funding via the Shuttered Venue Operators Grant (SVOG) program, and 17% through additional NEA grants. **Thirty-one percent of the smallest sized organizations did not report benefits from federal or other government funding programs.** Tables 10 and 11 below display the total number of selections for each funding type by budget size and chorus constituency type. Note that a chorus could select as many funding types as applicable.

TABLE 10

Relief Funding Types by Budget Size

| | Overall | Under \$50,000 | \$50,000 - \$99,999 | \$100,000 - \$149,999 | \$150,000 - \$249,999 | \$250,000 - \$499,999 | \$500,000 - \$999,999 | \$1 million and over |
|--|---------|----------------|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------|
| Localized funding at the state, county, or city level | 57 | 13 | 8 | 7 | 6 | 5 | 7 | 11 |
| SBA Economic Injury Disaster Relief & Loan Advances (EIDL) | 17 | 2 | 2 | 0 | 4 | 2 | 3 | 4 |
| Paycheck Protection Program (PPP) Loans | 53 | 2 | 5 | 6 | 5 | 11 | 9 | 15 |
| Additional National Endowment for the Arts (NEA) grants | 7 | 0 | 1 | 0 | 0 | 2 | 2 | 2 |
| Shuttered Venue Operators Grant (SVOG) | 21 | 2 | 0 | 1 | 3 | 2 | 5 | 8 |
| Other special government funding programs | 11 | 0 | 5 | 2 | 1 | 1 | 1 | 1 |
| No benefits received | 13 | 10 | 1 | 1 | 1 | 0 | 0 | 0 |

TABLE 11

Relief Funding Types by Constituency Type

| | Overall | Children/Youth Chorus | Professional Chorus | Volunteer Chorus |
|--|---------|-----------------------|---------------------|------------------|
| Localized funding at the state, county, or city level | 57 | 12 | 15 | 30 |
| SBA Economic Injury Disaster Relief & Loan Advances (EIDL) | 17 | 4 | 6 | 7 |
| Paycheck Protection Program (PPP) Loans | 53 | 13 | 17 | 23 |
| Additional National Endowment for the Arts (NEA) grants | 7 | 1 | 4 | 2 |
| Shuttered Venue Operators Grant (SVOG) | 21 | 3 | 10 | 8 |
| Other special government funding programs | 11 | 2 | 2 | 7 |
| No benefits received | 13 | 0 | 3 | 10 |

Expenses

The choruses in this dataset spent an average of \$450,924 in 2020/21. As the dataset may be skewed towards choruses with large budgets, median operating expenses by budget size and chorus constituency type is shown below in Tables 12 and 13. **Across the 107 organizations analyzed, median total operating expenses is \$128,352.**

TABLE 12

Median Operating Expenses by Budget Size

| Overall | Under \$50,000 | \$50,000 - \$99,999 | \$100,000 - \$149,999 | \$150,000 - \$249,999 | \$250,000 - \$499,999 | \$500,000 - \$999,999 | \$1 million and over |
|-----------|----------------|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------|
| \$128,352 | \$25,149 | \$75,927 | \$124,814 | \$197,480 | \$412,095 | \$693,166 | \$1,654,540 |

TABLE 13

Median Operating Expenses by Constituency Type

| Overall | Children/Youth Chorus | Professional Chorus | Volunteer Chorus |
|-----------|-----------------------|---------------------|------------------|
| \$128,352 | \$73,181 | \$368,459 | \$438,019 |

In general, organizations in the arts and culture sector decreased their expenses by 11% from 2019 to 2020 as noted in the SMU DataArts report *Studying Early Pandemic Data: Did Giving Sustain the Arts?* By functional category, program-related expenses remain the largest spending type. However, there has been a shift towards more dollars spent on general and administrative costs.

To help understand expenses, the SMU DataArts Cultural Data Profile breaks down expenses in two different ways – by expense category and function. The Cultural Data Profile asks organizations to classify expenses into pre-defined categories which are generally more detailed than standard audits. These categories are then rolled-up into broader groups for analysis. In looking at expenses by function, each type of expense is split into three functional groupings: Program, Fundraising, and General/Administrative. These groupings are standard in organization audits, under the Statement of Activities. For example, rent for rehearsal space is generally apportioned to “program” while office rent would be split between “fundraising” and “general”. **The proportions of functional categories shown in Figures 10 and 11 below mirror what is generally seen in the arts and culture sector more broadly.**

FIGURE 10

Breakdown of Functional Expense Categories, by Budget Size

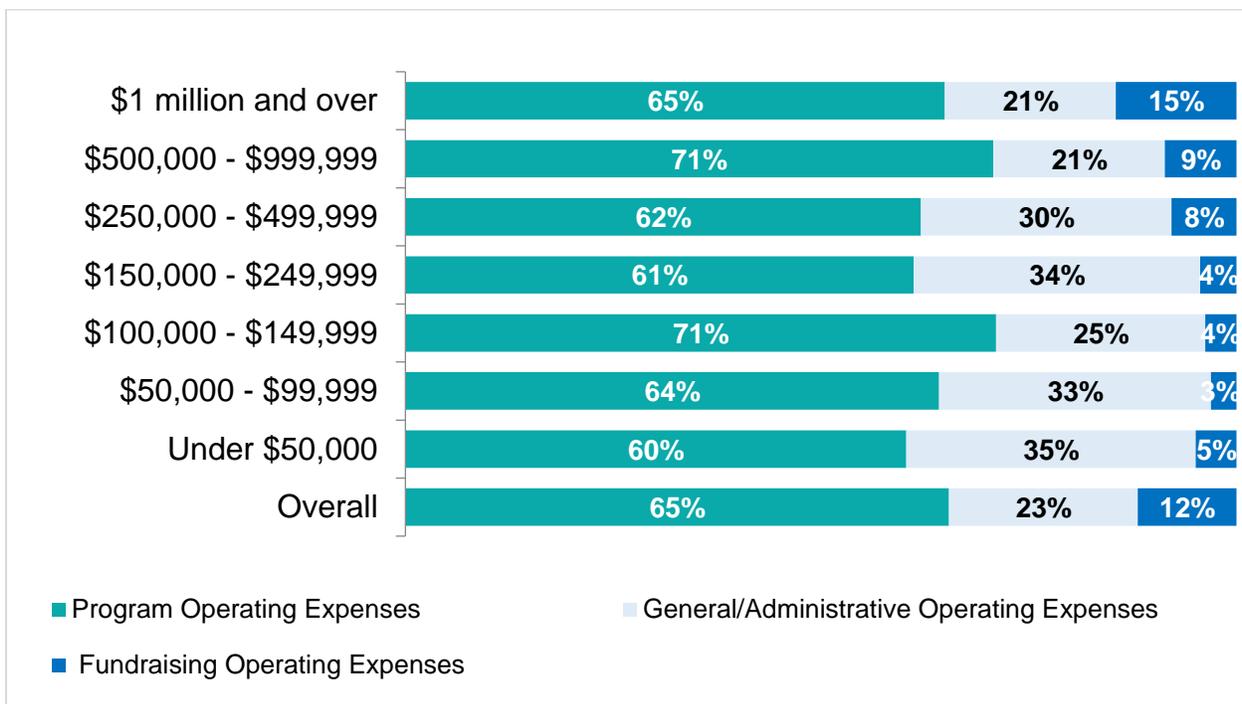
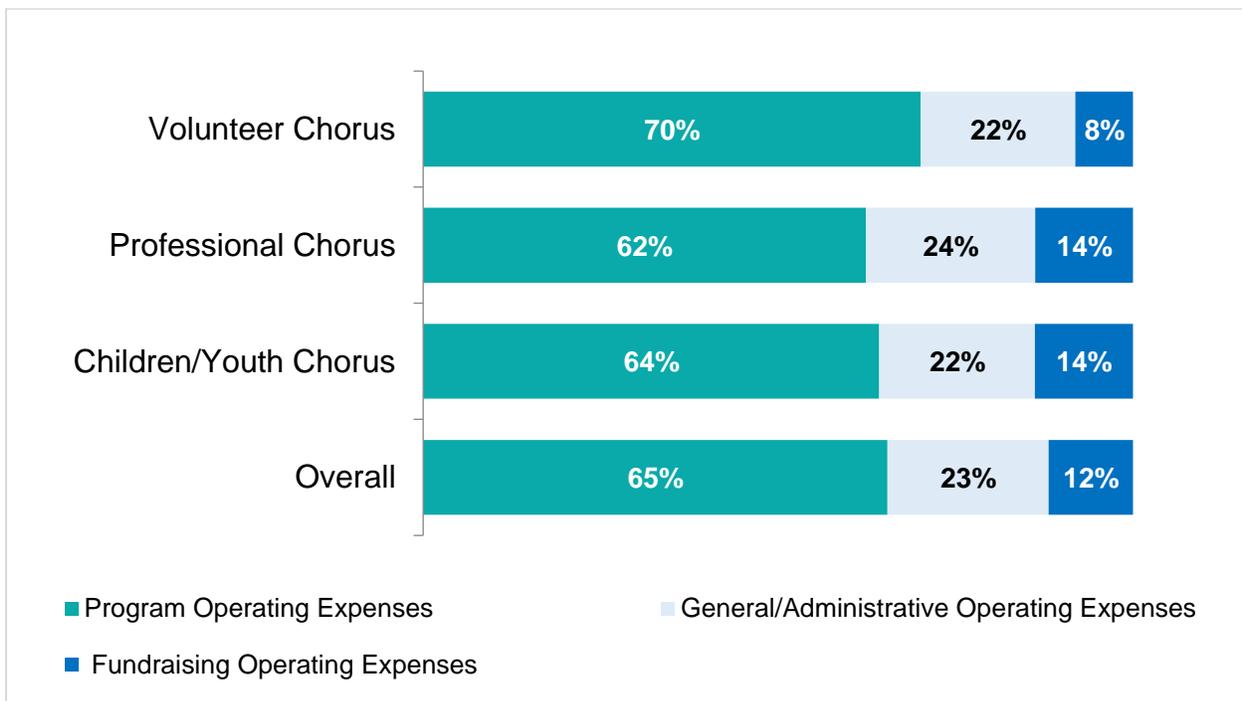


FIGURE 11

Breakdown of Functional Expense Categories, by Constituency Type



Figures 12 and 13 show expense types by budget size and chorus constituency type.

FIGURE 12

Breakdown of Expense Types, by Budget Size

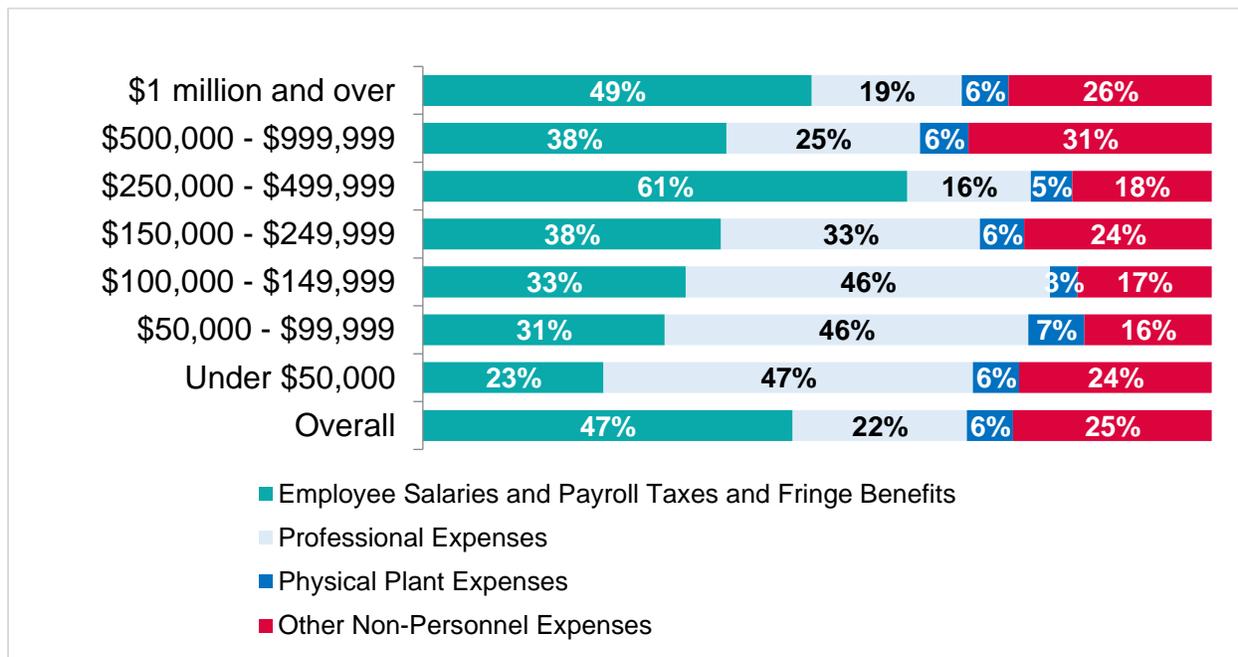
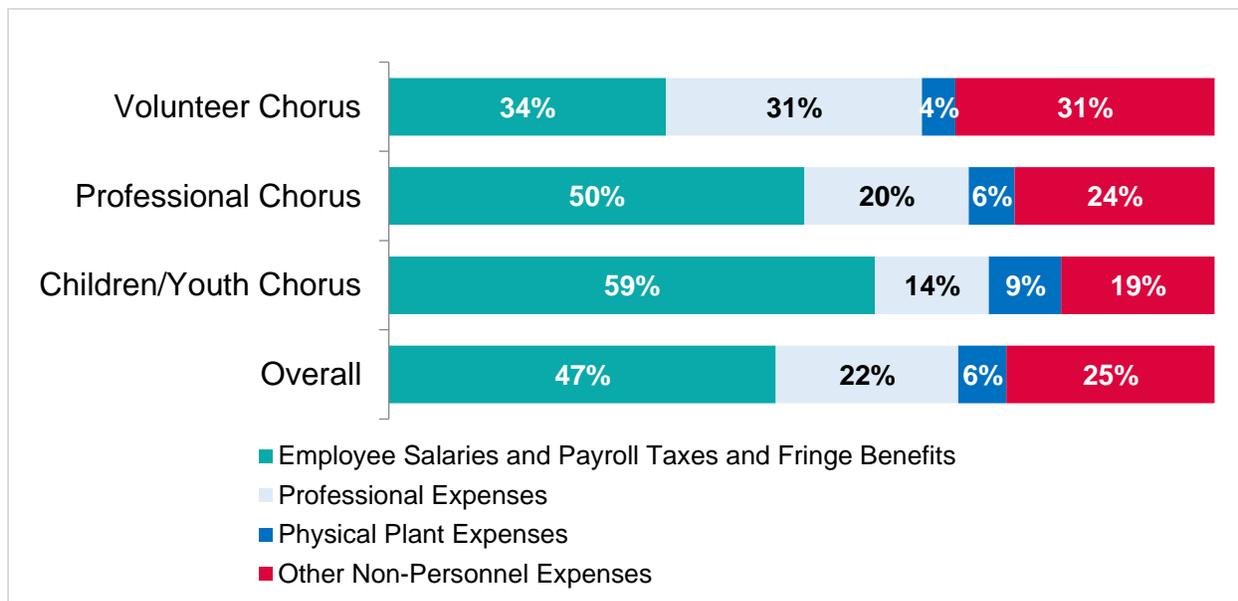


FIGURE 13

Breakdown of Expense Types, by Constituency Type



When looking at expenses by budget size, the largest expense category varies based on the size of the organization. This is similar to past reporting. For organizations with budgets below \$150,000, Professional Expenses – which includes any fees paid to companies or organizations for services, and payments to independent contractors -- is the largest expense category, making up nearly half of total expenses. For larger sized choruses, Professional Expenses are still significant, but Employee Salaries, Payroll Taxes and Fringe Benefits comprise over one-third of total expenses.

Trend Analysis: Level of Expense Reduction

As choruses responded to the pandemic and the reduction of programming, most were able to reduce expenses in order to reserve cash. Figures 14 and 15 below show percent change in operating expenses from fiscal year 2019 to 2021, as well as total operating expenses over time by chorus budget size. Without adjusting for inflation, nominal change shows an **overall expense reduction of 35% from fiscal year 2019 to 2021. Small and mid-sized choruses in particular greatly reduced their expenses.**

FIGURE 14

Percent Decrease in Operating Expenses, 2019-2021, by Budget Size

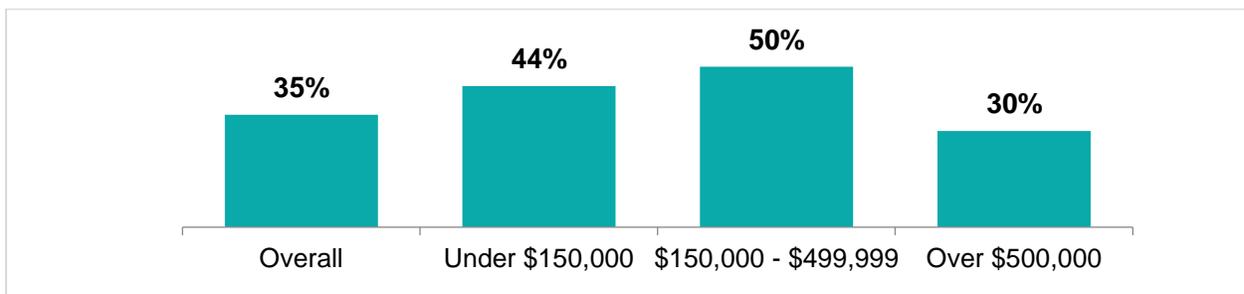
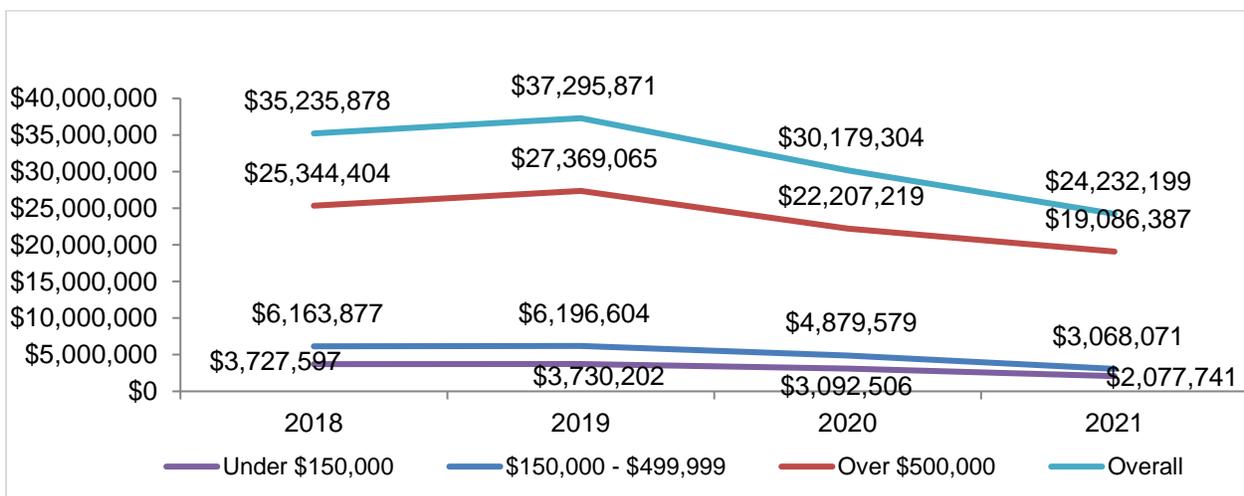


FIGURE 15

Total Operating Expenses, 2018-2021, by Budget Size



The figures below show personnel and non-personnel expense reduction by budget size.

FIGURE 16

Percent Decrease in Personnel Operating Expenses, 2019-2021, by Budget Size



FIGURE 17

Total Personnel Operating Expenses, 2018-2021, by Budget Size

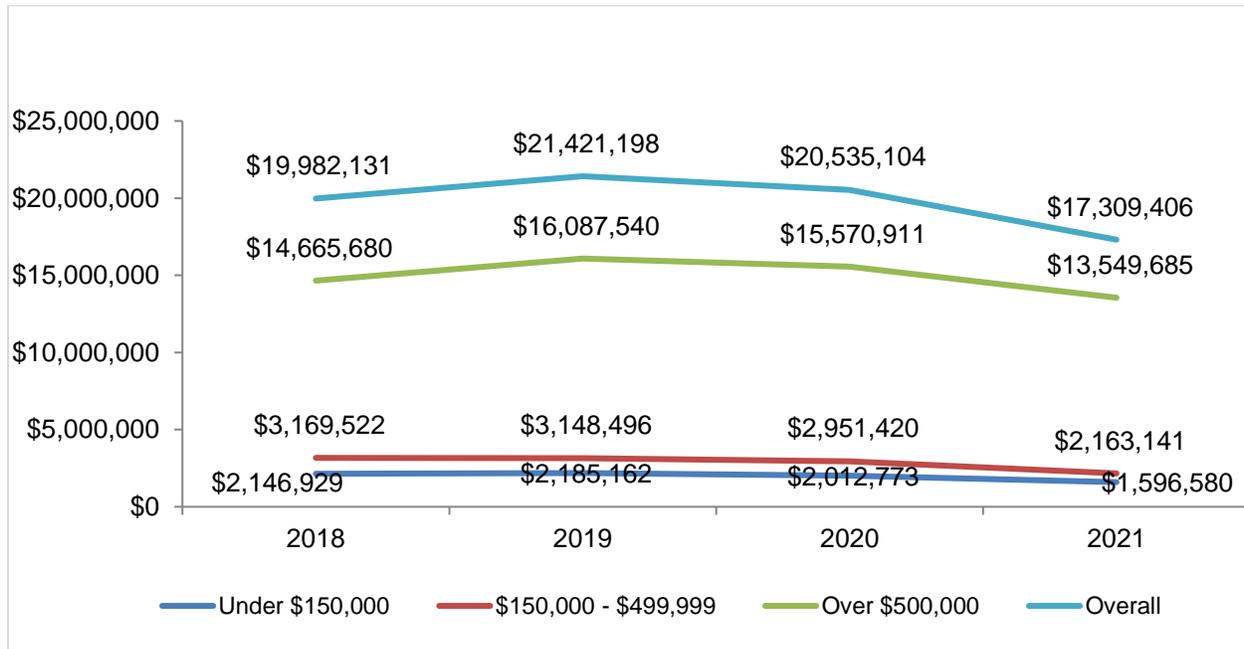


FIGURE 18

Percent Decrease in Non-Personnel Operating Expenses, 2019-2021, by Budget Size

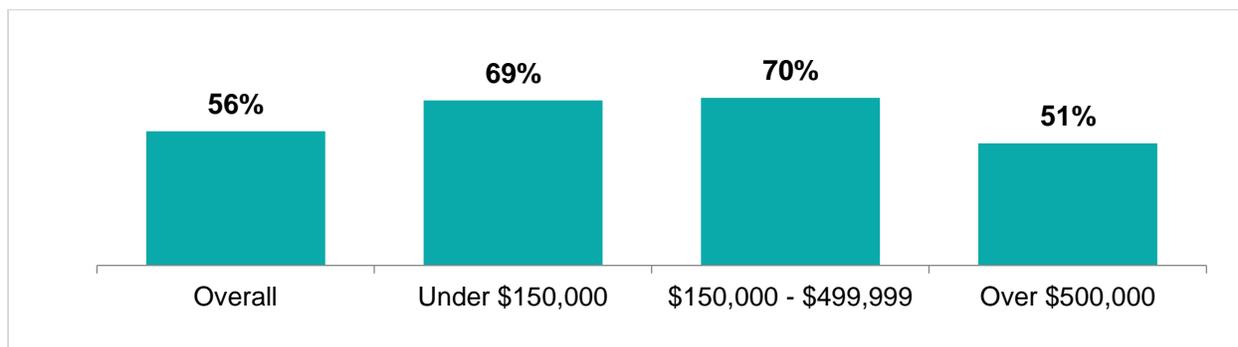
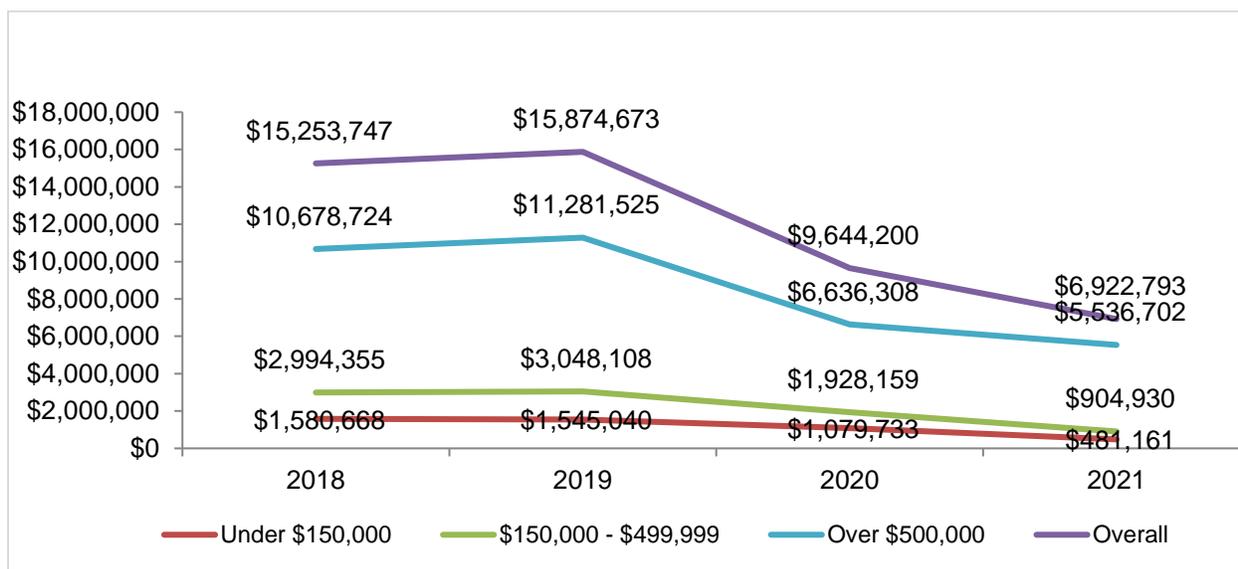


FIGURE 19

Total Non-Personnel Operating Expenses, 2018-2021, by Budget Size



While all choruses greatly reduced non-personnel expenses, the level of personnel expense reduction is highest among small- and mid-sized choruses. Note that the personnel expense category also includes professional fees as well as salaries and benefits. As noted in an earlier section of this report, professional fees account for nearly half of total expenses for small choruses, while larger choruses spend over one-third of their expenses on salary and benefits paid to employees.

The following section looks at whether choruses brought in enough money to cover expenditures during fiscal years 2020/21.

FINANCIAL HEALTH

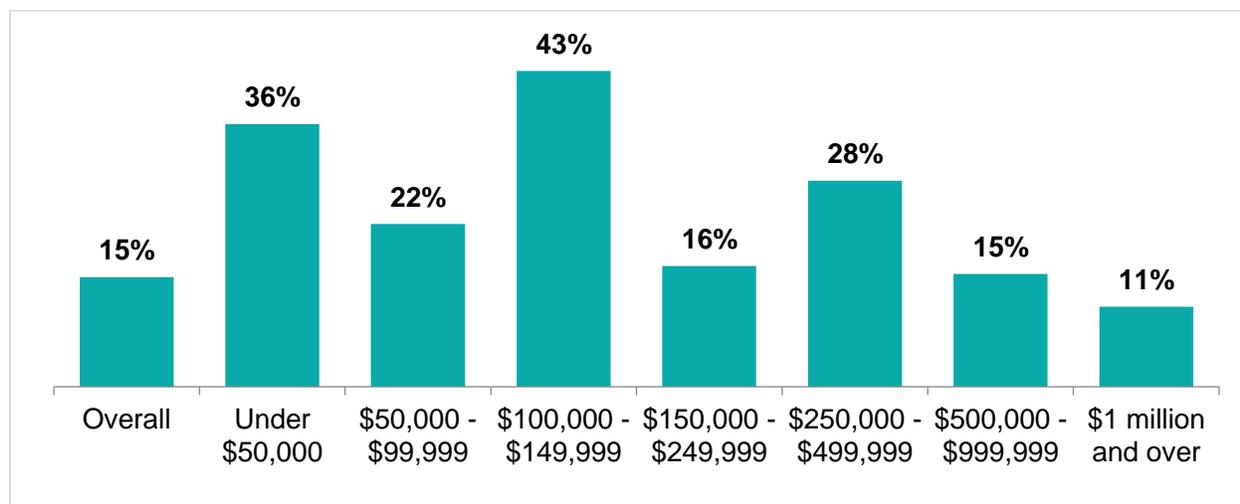
This section covers information related to the overall financial health of the choruses analyzed for this year's report. Note that for the metrics in this section, only choruses with budgets exceeding \$50,000 are asked to split their revenue by restriction. For small choruses, we utilized total revenue in our bottom-line calculations to ensure they could be included in our analyses.

Bottom Line

SMU DataArts' *The Bottom Line* report⁷ examined organizational bottom lines between 2016 and 2019 to understand whether organizations had enough revenue to cover expenses. Overall, findings revealed that bottom lines were higher in 2019 than in 2016 despite the annual diminishing of surpluses since their 2017 peak, all during a period of economic growth in the U.S. This information helped us better understand how prepared arts and cultural organizations were to weather the downturn brought about by the pandemic. The report also revealed that **the larger the organization, the more likely it was to end the year with an operating deficit, while smaller organizations demonstrated the highest bottom line.** Analyzing the sector as it entered the pandemic in SMU DataArts' March 2022 *Studying Early Pandemic Data: Did Giving Sustain the Arts?* report, organizations were able to maintain a 2% unrestricted surplus, meaning their unrestricted revenue was higher than expenses. Smaller organizations had higher surpluses compared to large organizations.⁸ This can be compared to the participating chorus data which reveals **choruses ending fiscal year 2020/21 with a 15% unrestricted surplus.** Figures 20 and 21 shows overall bottom line by budget size and chorus type.

FIGURE 20

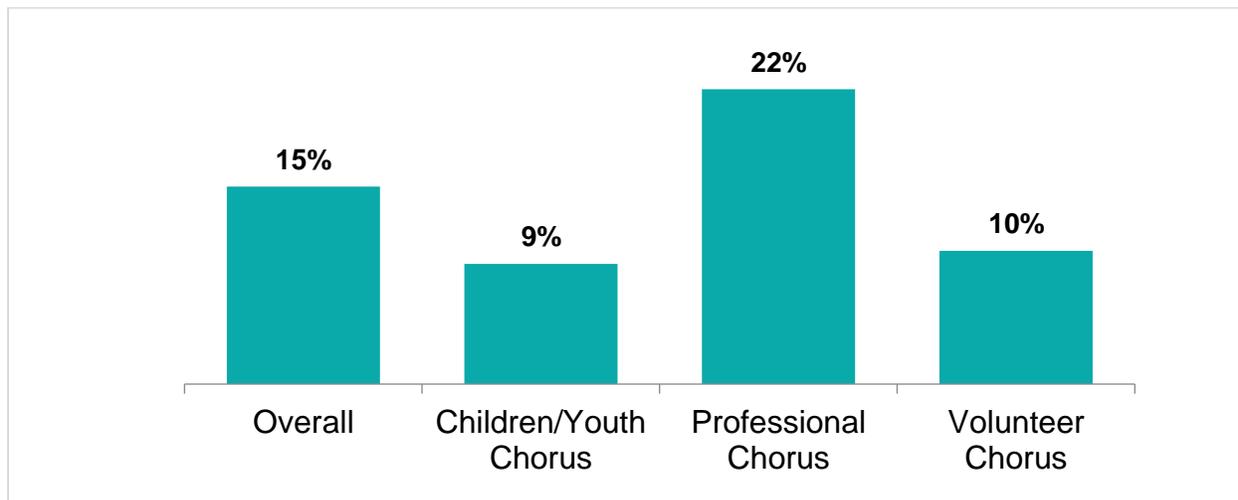
Level of Surplus (Bottom Line) by Budget Size



⁷ *The Bottom Line Report* SMU DataArts <https://culturaldata.org/reports/bottom-line/>

FIGURE 21

Level of Surplus (Bottom Line) by Constituency Type



Looking across budget sizes and choral types, while all cohorts experienced a surplus of at least 9%, **choruses with budgets under \$100,000 were most able to pivot in order to sustain their** organization generating an overall surplus of 22% for those with budgets between \$50,000 and \$99,999 and 36% for choruses with budgets below \$50,000. This reflects what has been seen across small organizations in the arts and culture sector.

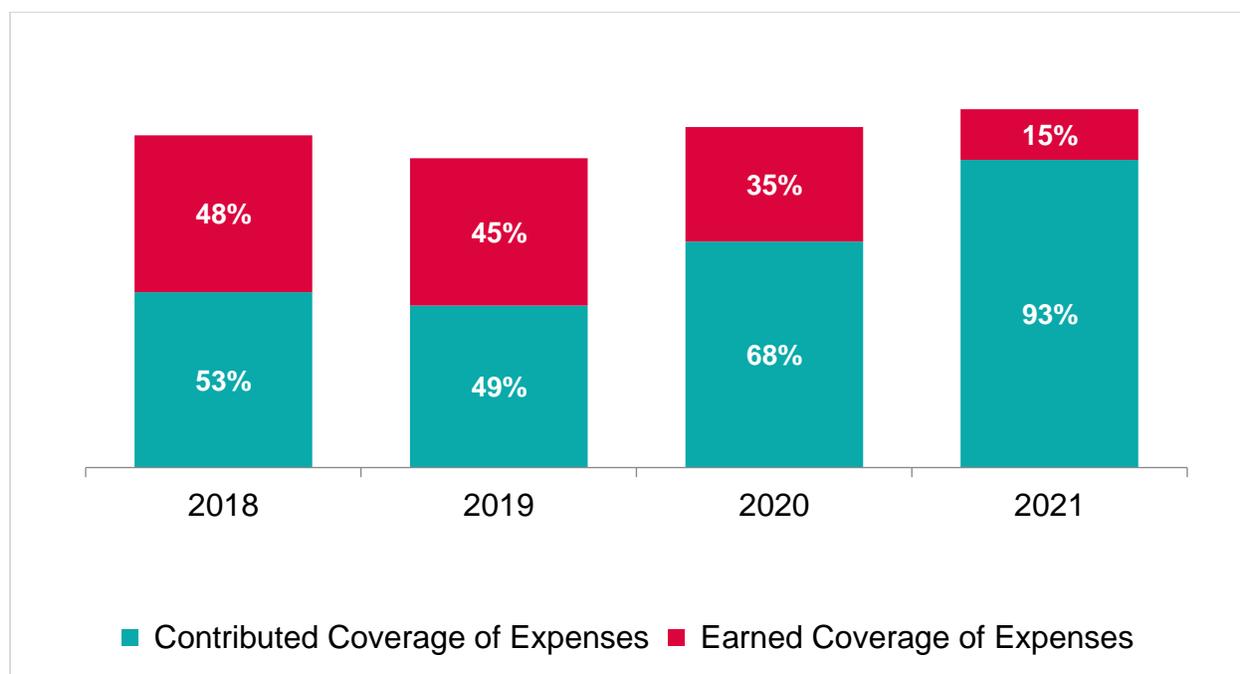
Coverage of Expenses

Leading up to the onset of COVID-19, choruses were able to cover nearly half of their annual expenses with earned revenue streams and half with contributed revenue as noted in SMU DataArts' March 2020 report *Studying Early Pandemic Data: Did Giving Sustain the Arts?*. This is similar to what was seen in the sector as a whole.

Figure 22 reflects an increased dependence on contributed revenue. In fiscal year 2021, **contributed revenue covered nearly all annual expenses among choruses in the trend dataset. Earned revenue covered 15% of expenses.**

FIGURE 22

Coverage of Expenses Over Time



As learned in previous sections, the way choruses were able to cover expenses differs by budget size. For larger choruses, an influx of support from the federal relief funding assisted in expense coverage. Smaller choruses primarily focused on minimizing expenditures across the board. While large choruses spend a significant portion of their revenue on salaried employees, small choruses see half of their budget going towards professional fees, including independent contractor payments. A later section in this report will explore workforce shifts among choruses.

LOOKING FORWARD

This section discusses trends in revenue loss as well as data presented in the 2020 report which was taken from the COVID-19 Impact Survey distributed by Chorus America. The survey asked respondents to indicate the level of impact experienced at the onset of the pandemic, as well as projected estimates on future revenue streams and funding.

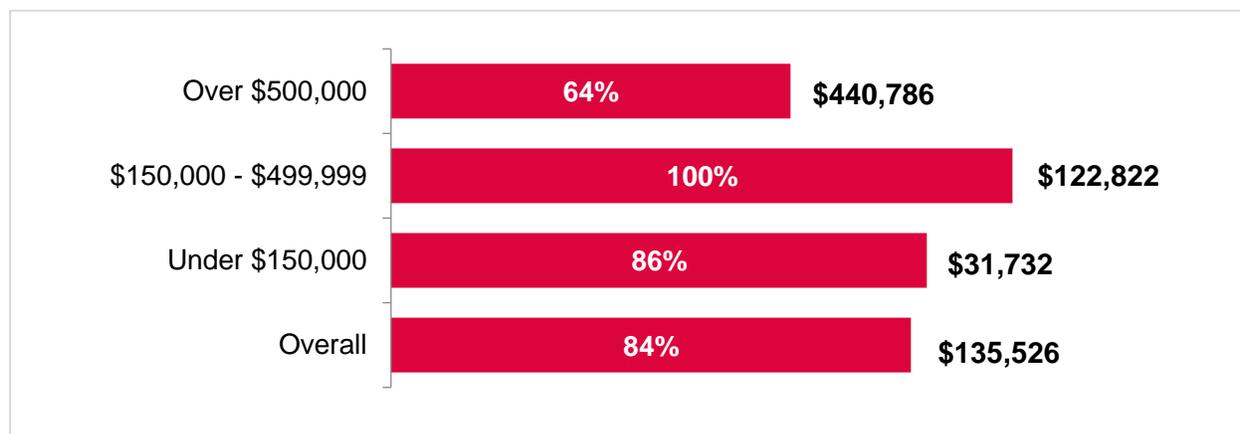
It is worth noting that comparisons between the 2020 projection data and the CDP trend dataset is not an apples-to-apples comparison, as the Chorus America COVID-19 survey population differs considerably from the CDP trend dataset. However, the broad takeaways between the projected losses and actual losses can be utilized as tools for future financial planning.

Financial Impacts of COVID-19

In the 2020 report which utilized data collected early into the pandemic, 92% of responding choruses projected a loss in revenue. Average loss projected was roughly \$68,000 with 46% of that loss coming from earned revenue sources. Figure 23 displays the percent of choruses in the trend dataset who reported a loss in revenue in 2020/21. Note that figures have not been adjusted for inflation.

FIGURE 23

Percent of Choruses Reporting Revenue Loss from 2019 – 2020/21 by Budget Size
(Avg Total Revenue Loss \$)



The trend dataset reveals that 84% of choruses experienced an actual loss in total operating revenue from fiscal year 2019 to 2020/21. Most of the revenue loss comes from a reduction in earned revenue; in fact, **all choruses experienced a loss in earned revenue, while 1 out of 3 choruses experienced a reduction of contributed revenue.** Among choruses experiencing revenue loss, the average loss from 2019 to 2020/21 was \$135,526.

CHORUS STAFFING

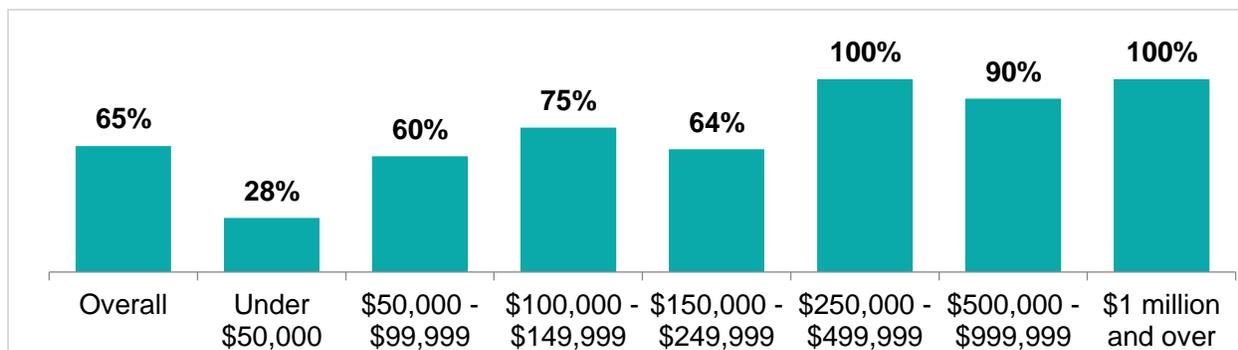
This section summarizes chorus responses within the Cultural Data Profile regarding paid and volunteer staff with part or full-time work status. **Nearly two-thirds (65%) of choruses analyzed reported at least one full- or part-time paid staff person.** The distribution of all respondents across staff configurations were:

- Zero paid staff: 35%
- Full-Time only: 24%
- Part-Time only: 23%
- Full and Part-Time staff: 18%

Percent of respondents reporting full or part-time staff across budget size is shown in Figure 24 below. **Twenty-eight percent of the smallest choruses reported full or part-time staff in fiscal year 2020/21, compared to more than half for all other budget categories.**

FIGURE 24

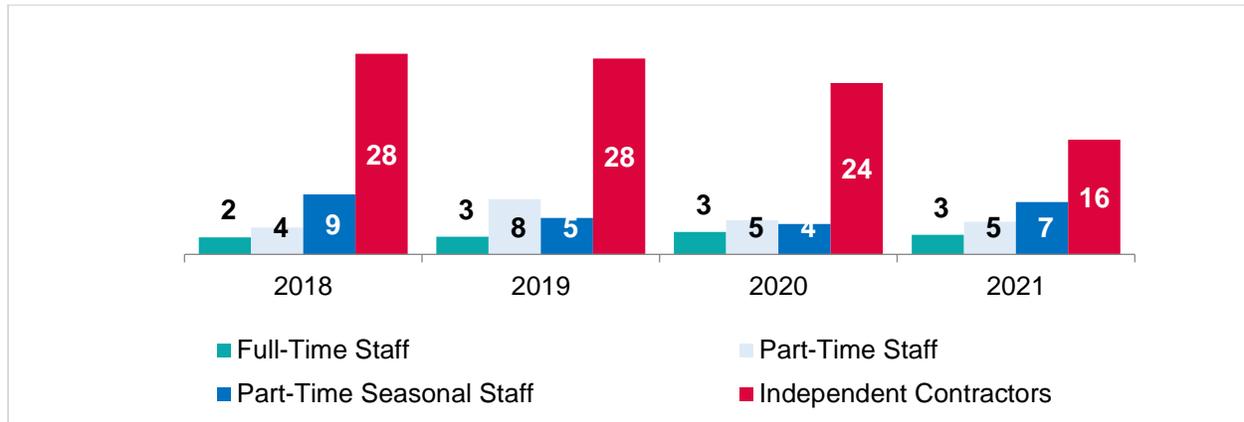
Percent Reporting Full or Part-Time Staff, by Budget Size



Average count of independent contractors from fiscal year 2018 to 2021 is shown in Figure 25 below.

FIGURE 25

Average Workforce Count, 2018-2021



From 2018 to 2021, the average count of full-time employees remained steady. However, **average count of independent contractors – those who were not part of an organization’s payroll – decreased significantly, with organizations reporting an average of 16 independent contractor workers in fiscal year 2021 compared to 28 in 2019.** Recall that these contract workers comprise a large portion of total expenses among small-sized choruses.

PROGRAMMING & ATTENDANCE

The 2020 Chorus Operations report indicated that before the pandemic, choruses spent **74 cents of every dollar on programmatic expenses, with the average chorus presenting 18 performances and 10 productions.** As the pandemic surged, choruses greatly reduced their expenses. With expense reduction also came a limited number of opportunities for audiences to engage with choruses via live performances. In fact, in fiscal year 2020/21 choruses produced only 2 in-person events on average.

COVID-19 Impact on Chorus Programming

SMU DataArts added an additional optional question to the Cultural Data Profile in December 2020 which asked organizations whether they ceased, modified, or delivered their programming normally during the period of COVID-19. Figures 26 and 27 shows the distribution of selections among choruses, by budget size and constituency type.

FIGURE 26

COVID-19 Impact on Programming by Budget Size

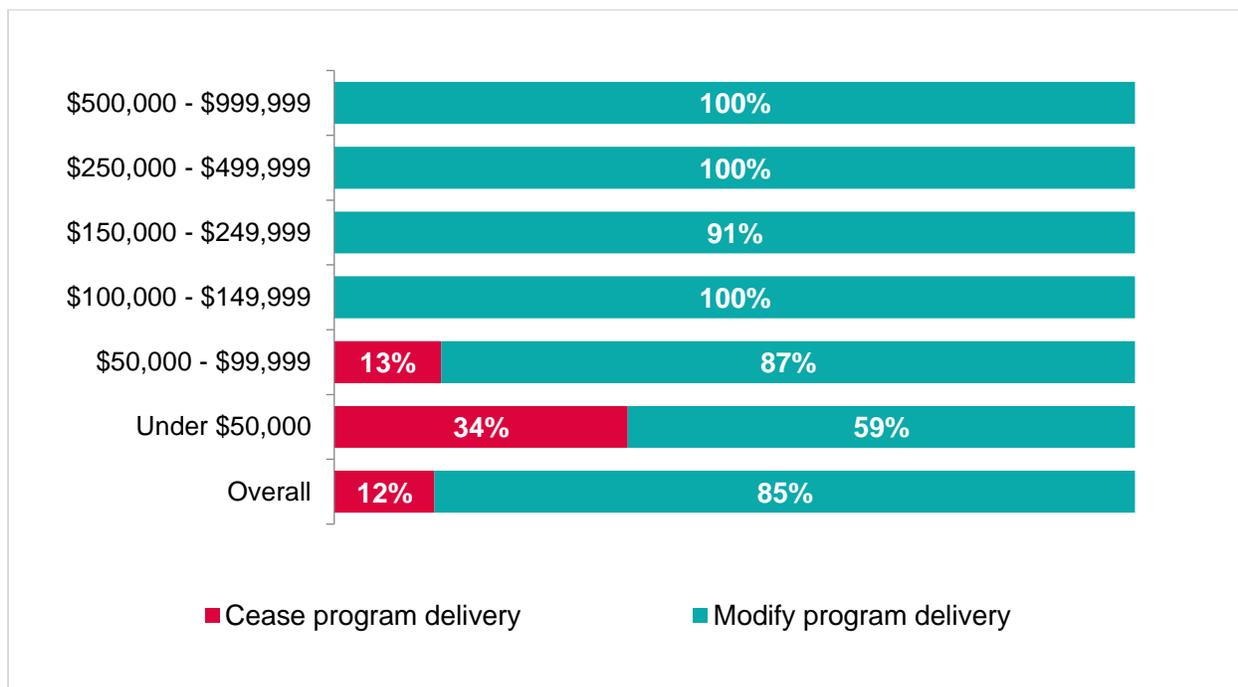
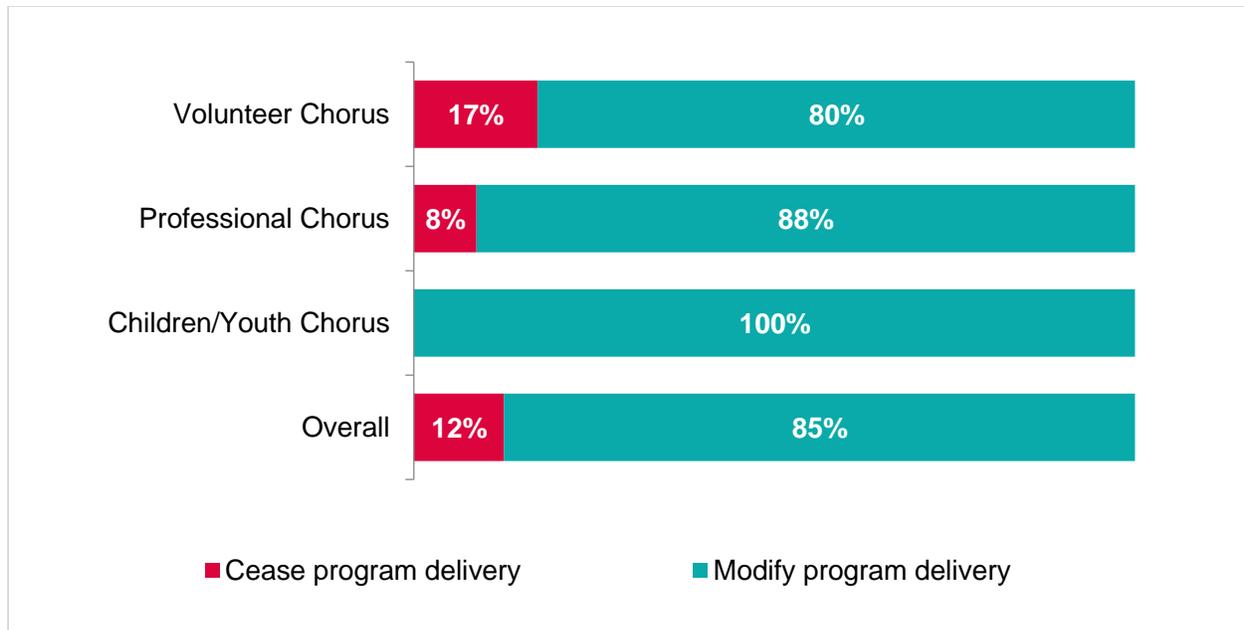


FIGURE 27

COVID-19 Impact on Programming by Constituency Type



Eighty-five percent of choruses modified their program delivery in 2020/21. They responded to the challenge the pandemic presented in a myriad of ways, including digitizing their offerings and developing protocols for health and safety⁹. **In fiscal year 2020/21, choruses produced an average 13 distinct performances. Nearly all of these were produced digitally.** The following section details the types of digital offerings choruses provided to audience members in 2020/21.

Digital Productions

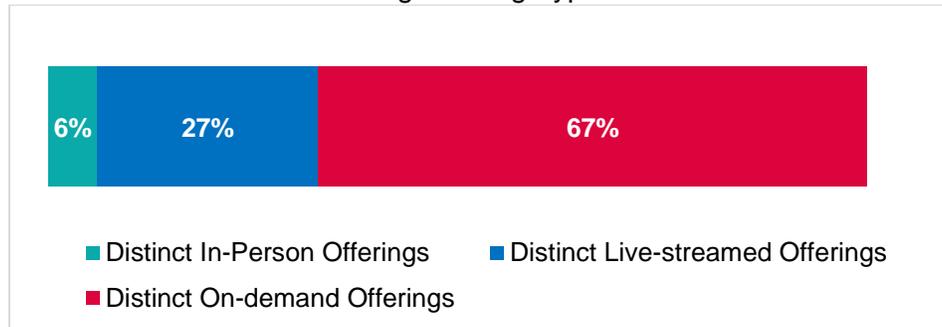
In December 2020, SMU DataArts streamlined their Cultural Data Profile, identifying data points used most frequently in funder and analytic reports as well as field research. Incorporating feedback from arts and cultural organizations as well as grantmakers, the CDP was pared down significantly while adding details around data points most desired by the sector. Part of this streamlining process included details on digital programming, as many organizations had already begun utilizing virtual methods of engagement before the onset of COVID-19. Adding this section allowed choruses to input details on digital programming, such as whether a product was distinctly provided on demand or broadcast live – including how many times a production was broadcast over the course of a fiscal year.

⁹ Mike Rowan. *A Few Early Ventures Into In-Person Singing Chorus America*. July 2020
<https://chorusamerica.org/publications/blog/few-early-ventures-person-singing>

Figure 28 shows the makeup of programming among choruses in 2020/21: distinct in-person programs, distinct live-streamed programs, and recorded on-demand programs that were made available during the fiscal year (whether the content was produced during or prior to 2020).

FIGURE 28

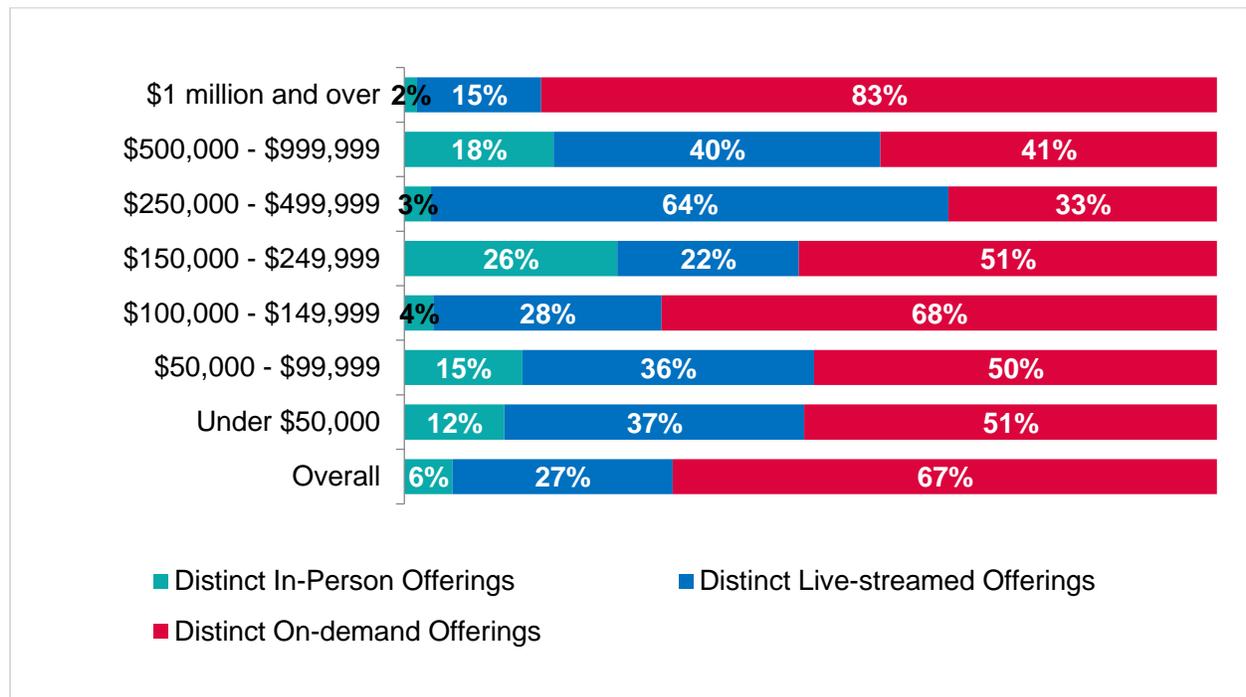
Programming Types



Over two-thirds of chorus programming was distinct on-demand productions or programs. These recorded on-demand programs could be viewed at any time by audiences and may include recordings of in-person or live-streamed offerings, as well as programs recorded specifically for on-demand viewing. Recorded programs could have been created within or prior to the FY2020/21 fiscal year. Figure 29 shows these program types by budget size.

FIGURE 29

Programming Types, by Budget Size

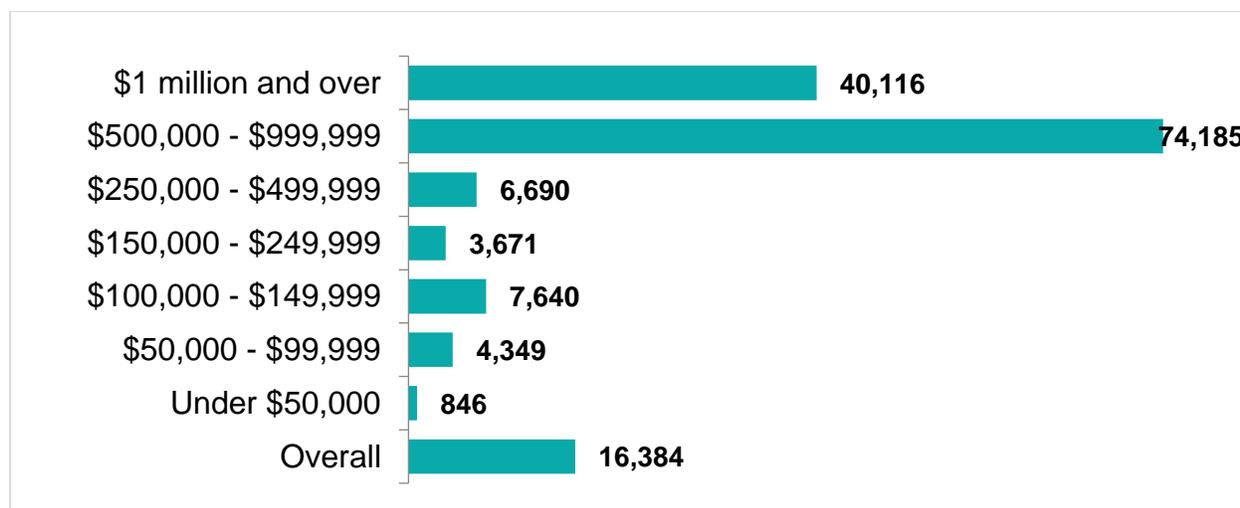


Attendance

As productions were nearly all virtual in 2020/21, so was participation. Figure 30 shows average annual virtual attendance by budget size.

FIGURE 30

Average Virtual Attendance, by Budget Size



Generally speaking, as organizations increased in size so did virtual attendee numbers. **Across budget sizes, choruses in 2020/21 were more likely to offer digital programming free of charge.** For those that did charge ticket or admission fees, the range was \$9-\$25 per ticket.

CONCLUSION

The results of this report reveal how choruses responded to the initial impacts of COVID-19. Reduction of expenses and a shift towards digital programming mark significant adjustments choruses made during this challenging time. Not only choruses, but organizations across the sector experienced challenges in pivoting to new audience behaviors, responding to mandates around safety and programming, as well as securing funding and retaining employees. The arts sector increased its reliance on contributed revenue sources while reducing expenditures by 11%. As organization leaders create new projections on revenue streams and respond to changes in the social and economic climate, the data in this report can serve as a roadmap of how the sector has managed an unprecedented crisis in 2020. Every crisis may have its own unique barriers, but forward-thinking leadership and a vision that is adaptable toward the future can be a powerful tool in weathering future storms.

ABOUT SMU DATAARTS

SMU DataArts, the National Center for Arts Research, is a joint project of the Meadows School of the Arts and Cox School of Business at Southern Methodist University. SMU DataArts compiles and analyzes data on arts organizations and their communities nationwide and develops reports on important issues in arts management and patronage. Its findings are available free of charge to arts leaders, funders, policymakers, researchers, and the general public. The vision of SMU DataArts is to build a national culture of data-driven decision-making for those who want to see the arts and culture sector thrive. Its mission is to empower arts and cultural leaders with high-quality data and evidence-based resources and insights that help them to overcome challenges and increase impact. To work toward these goals, SMU DataArts integrates data from its Cultural Data Profile, various membership-based partners such as Chorus America, and other national and government sources such as Theatre Communications Group, the National Endowment for the Arts, the Census Bureau, and IRS 990s. Publications include white papers on [emergence from the COVID-19 crisis](#), [high-performing arts organizations of color](#), [protecting arts organizations through downturns](#), [working capital and the resiliency of BIPOC organizations](#), the [intersection of Funding, Marketing, and Audience DEI](#), and more. SMU DataArts also publishes reports on the health of the U.S. arts and cultural sector with the annual [Arts Vibrancy Index](#), which highlights the 40 most arts-vibrant communities around the country. For more information, visit www.smu.edu/dataarts.