Small and Mighty
*A Study of Small and Midsized Presenting Organizations
in the United States*
Executive Summary
September 2020

The Association of Performing Arts Professionals (APAP) presents national research intending to benefit a segment of the field that has, at the national level, been largely overlooked: small and midsized presenters or, as they have become known, SAMPs. Questions to be addressed were their general distribution, working structures, contexts in which they are working, changes in their broader communities or organizations, and any needs that APAP or the Regional Arts Organizations (RAO) might be able to address. The study was open to nonprofit presenting organizations with budgets from $50,000 - $2 million, and that pay at least $25,000 per year in artist fees. Of the 1,988 that were sampled, a total of 606 or 30% participated in the survey and 410 (21%) qualified on all criteria. *The survey was conducted in the fall of 2019, before the COVID-19 pandemic. Additional data were gathered in June 2020 about the effects of the pandemic on SAMPs and presented in the COVID-19 Supplement (July 2020).*

A. The SAMP Landscape: Respondents' Organization Types, Sizes, Ages, and Locations.
More than half of respondents are independent 501(c)3 organizations. More than one-third are affiliated with colleges, either as programs or with (c)3 status; units of government comprise a smaller group. Respondents' organizations were founded over 172 years, between 1847 to 2019. By far the largest percentage of organizations—45%—were founded between 1976 and 2000, following the creation of the National Endowment for the Arts in 1968. Three quarters have budgets of less than $1 million and half have budgets of less than $500,000. Close to half—43%—have annual artist fee budgets of less than $100,000. Well over half (57%) typically pay artists less than $10,000. All but two states (Alabama and North Dakota) are represented.

B. A Closer Look at Community: Types and Changes. The study investigated the type of communities where SAMPs reside to create a picture of their locations, environments and context in which they work. Respondents were roughly split into thirds: 1) rural, 2) urban and 3) both suburban and other types combined. The largest portion—38%—are in rural locations. Respondents were asked to choose if, and how much, five aspects of their community had changed in the past three years. One-quarter to one-third experienced some degree of change in one or more aspects. The most frequently mentioned area of change was gentrification. Respondents' comments about gentrification reflected deep concerns about how increased housing costs affect the makeup of neighborhoods, and the resulting displacement of longtime locals, including artists, people of color and those with low incomes. These concerns were consistent across communities and organization types. For presenters in large urban areas, housing prices continue to soar, escalating the crisis. Rural presenters may feel the effects differently; for a handful, their communities become second homes or destinations for wealthier people or provide larger homes for local

residents. Presenters in communities that attract tourism—from North Carolina to California—recognized the double-edged sword of having a flourishing tourism industry, and the resulting displacement of wage workers who serve vacationers but can no longer afford to live in the communities where they work.

Other themes included politics and immigration, as well as audience demographics. Some SAMPS, particularly those in rural areas, commented on the trickle-down effects of the national election on community interactions and even audience behavior. General comments were made about the shifting of local and state governments from red to blue, or vice versa. Positive comments about politics were rare, and typically expressed pride in the presenters' liberal positions in contrast with their more conservative surroundings, as well as their responses to political tensions brought about by the national election. Across nearly all comments on immigration, one theme was rampant: presenters' concern over immigrants' fears for their own safety. Presenters feel tension and concern, prompted by changes in national politics and immigration policies, which leave immigrants feeling unsafe. Comments on demographics of audiences were simpler and predictable. Respondents stated that their audiences had become more "diverse," and defined or implied that diversity meant either by ethnicity or age. For most respondents who referenced younger audiences, comments were also brief and nonspecific, but they seem to be moving from audiences over age sixty to those of parenting age.

C. Structure: Staffing and Budgets. SAMPs offered their opinions and stories about how they carry out their jobs, revealing some of their biggest challenges. The majority—90%—have some full-time salaried staff but exactly half have no more than three of them. The vast majority of respondents—84%—work in programming. More than half of them work in fundraising and education, and nearly half work in marketing and finance. They are most likely to have other paid staff in venue operations, front and back of house, and marketing. Two-thirds of respondents (272) have their own board of directors; more than half of these boards provide governance only, and another one-third are working boards and governance.

Clearly the SAMP respondents wear many hats within their organizations. *Exactly half, or 50% of respondents, play four or more roles within their organizations.* All 268 (71%) who felt that the wearing of hats was more extreme for them than other organizations explained why in comments that were longer and more emotional than any other part of the survey. About one-quarter seemed to carry the weight of the world on their shoulders from fulfilling so many roles within their organizations. They provided lists—or for some litanies—of all the job titles that they maintain, or tasks that they complete. An independent presenter in a Maryland suburb exclaimed, "I don't wear many hats—I wear ALL the hats. There is no aspect of the operation that I can delegate completely." This job overload can play out differently for institutions, where respondents described their relationships to—and sometimes tensions with—the larger entity. They described the dual roles they play to both present and realize a mission that is unrelated to their presenting work. A college presenter in rural Texas wrote: "I am a full professor [and teach] 5-6 courses a semester, program and negotiate contracts, supervise the box office and the facilities, and [serve as] technical director for the building and all events that take place in it." About 25 explained, in a more granular way, the patchwork of roles and dual functions that they, and others affiliated with their organization, play, including single-person departments, managing the organization on a volunteer basis, dividing responsibilities with volunteer members, or overlapping responsibilities of venues that serve multiple uses. For some, the unstaffed yet constant need to fundraise looms over all positions.

D. Programs, Events, and Venues. Respondents reported on the capacities for a total of 583 venues. The smallest venue accommodates 25 people, reported by two respondents, and the largest venue has a capacity of more than 20,000, also reported by two respondents, both for outdoor festivals. The median venue size is 420 seats. Of the 265 who responded, three-quarters have venues with more than 400 seats

and nearly half (121 or 46%) have venues with 800 or more seats. Half program from fall to spring, with an additional 39% programming in the fall to spring and summer. By far, music was the most common art form, presented by 94% of respondents. Following that, three disciplines are nearly tied: theater, family/student programming, and dance, each of which were presented by more than two-thirds of respondents. The average number of events was 18 and the median was six events during a season. A total of 96% offer some free events, with more than half offering 1 to 10 of them. Respondents' opinions about offering free programming were fairly—but not overwhelmingly—positive. There was a three-way split between respondents who felt free programming fulfilled their mission to serve their broad communities, those who felt that audiences devalued free events, and those who had mixed attendance levels at free events. Around 150 respondents (37%) left many of the questions in this section blank. It appears that questions that required specific numbers were less likely to be completed than those asking for commonly known information or opinions. Nearly half rent their venues and 40% own venues.

E. Audiences and Attendance. This section looks at overall attendance as well as audience types and demographics, and respondents' mission statements, as they relate to audiences. More than 60% of respondents draw fewer than 25,000 audience members per year. More than 60% have fewer than 15,000 paid audience members. Ten organizations present all events for free. Nearly half (47%) of all respondents have primary audiences who are 55 and older. The second most prevalent group (20%) is an even mix of older adults, younger adults and families. More than two-thirds (70% or 268) have audiences who are primarily white/Caucasian. The majority of organizations (85%) have missions that include broad language about welcoming "everybody" or diverse populations into their venues. A look at audience type, by mission language, reveals that respondents who reach ethnically diverse audiences were more likely to name, in their mission statements, people of color as well as other groups, including disabled, LGBTQIA and low income.

Most respondents (85%) reported experiencing challenges in attracting younger audiences, and many described efforts to address this challenge. The most common was to program, intentionally, in ways that appeal to a younger demographic, for "all" audiences or to diversify programming. A few mentioned presenting artists who they described as younger, emerging or "edgier," or popular and/or commercial acts, particularly music. Some described offering unique events and/or events in uncommon venues that appeal to younger audiences. A small number described strategies of pricing, hiring younger staff and/or including younger people in planning their seasons or events. Finally, more than 50 respondents mentioned collaborations with organizations and/or groups aimed at increasing participation of younger audiences.

F. Community Engagement: Forms, Strategies and Challenges. About three-quarters of respondents offer four forms of engagement for their audiences or communities: partnerships with other organizations to generate and diversify; K-12 programming; free programming; and/or conversations with artists or experts. By far, respondents' largest current partners are educational, primarily K-12 and secondarily colleges; nearly 60% partner with seniors' groups. Regarding how their broader environment informs their programming decisions, many tended to offer similar, brief comments about programming in a manner that presents "diverse" artists and/or attracts diverse audiences, with some mentioning equity and inclusion. A smaller group proposed more intentional strategies, such as offering programming that is relevant, creates empathy and awareness, occurs in nontraditional venues, or targets specific cultures and demographics. A few wrote of programming in response to the current national political climate and a smaller theme emerged: the need to program for conservative audiences or to avoid political controversy altogether. The biggest challenge in audience engagement, reported by about three-quarters of respondents, is low attendance for events. Nearly half found that audience engagement requires too much labor and other costs. A quarter of respondents offered comments that shed additional light, including the

lack of available staff to plan time-intensive engagement activities, coupled with the tensions that sometimes exist among different departments, when staff is expected to collaborate on engagement activities. In contrast, a prevalent theme, particularly among independent presenters, was their *lack* of challenges, and positive experiences with offering engagement activities. One advised that "if you don't encounter challenges you aren't taking chances."

G. Needs and Final Thoughts. SAMPs were asked about their opinions on a list of statements about their strengths. Nearly all respondents agreed that SAMPS are committed to presenting artists of the highest quality; navigate many challenges; manage limited budgets; know their communities; and can be thought of as small and mighty, given their abilities to stretch budgets and solve problems. Respondents were asked if given another $100,000 per year, to be used in any way that they wished, how they would use it. Most would spend it on staffing or staffing in combination with programming. When asked about their challenges, SAMPs' top limitations appear to be in areas focused on their external relations, including garnering money, partnerships and audiences—areas that involve developing or nurturing relationships with funders, organizations, patrons and audiences. Respondents appear less limited in controlling their internal management, including staff retention, making progress in addressing diversity, or producing standard engagement activities.

Respondents were informed that APAP is considering ways to address the needs of SAMPs and were asked to indicate their interest level in range of needs. Nearly all respondents to this question registered interest in nearly all needs. The most interest—both in numbers and intensity—was for a funding initiative that would serve SAMPs. The second highest interest was cost-effective access to the APAP conference. The next three—with nearly identical interest levels—were about peer sharing in marketing, audience engagement, and/or through forming a peer group. If respondents were interested in being part of a cohort, they were asked to indicate what purposes it might serve: for the majority—81%—a cohort would simply allow them to connect with peers. Knowing that most presenters use a combination of methods to select artists, respondents were asked for their single, most preferred way; nearly half (45%) rely on some form of live viewing, either through showcases or live performances, and 28% rely on some form of personal vetting. A through-line among comments was the value of recommendations, which might come from a trusted manager, agent, staff, faculty, patrons, peers or peer networks, audience members or, in rare instances, artists themselves. One-quarter of those who offered final thoughts thanked APAP and the regional organizations for conducting this survey, for their interest in SAMPs, and look forward to using and sharing the information generated by this survey.

Recommendations. Recommendations were developed with APAP staff and are presented for consideration. SAMP leaders likely are living under a time of stress and uncertainty, regarding when or if their facilities will open in 2020, what life will be like when they do open, and how they will pay for artists, staff and maintenance. Within that context, the following are offered: Advocate for SAMPs' presence within the presenting field and their value to artists and audiences by featuring them in publications, conference sessions, and on social media, such as via an Instagram campaign. Monitor innovation and solutions that SAMPs are developing to present artists as their communities begin to reopen. Convene cohort(s) of SAMPs, on a regional basis and/or during the APAP conference. Offer ways for SAMPs to exchange ideas about artists they might book, through virtual showcases, compiling referrals to artists and in other ways. Launch and facilitate a dialogue to foster successful relationships between agents and SAMPS by asking agents to respond to this report and help design responses. Create infographics that illustrate what the arts field needs to know about SAMPs including their average annual budget and number of staff, as well as number of events and artists presented each year. Design a funding initiative that, in this time of COVID-19, supports innovation in the presenting field, including SAMPs.