

NATIONAL ARTS AND CULTURE IMPACT SURVEY

ENQUÊTE NATIONALE SUR LES RÉPERCUSSIONS DANS LE SECTEUR CULTUREL

NATIONAL ARTS AND CULTURE IMPACT SURVEY: ONTARIO INDIVIDUALS REPORT

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Background and methodology

- The National Arts and Culture Impact Survey was co-commissioned by a group of national and provincial arts service organizations representing a range of artistic disciplines. The survey was designed to capture a snapshot in time of arts organizations, artists, and arts workers across Canada.
- The survey was made available to individuals from November 3 to 23, 2020.
- In total, 523 individuals from Ontario completed the survey.
- Results are presented based on those who responded to the survey and data was not altered to assess the representativeness of those who responded to the survey.
- To statistically assess verbatim responses to open-ended questions, PRA developed themes based on common responses and associated numerical codes to each theme, which were then assigned to each comment when a theme/topic was discussed by the individual.



Impacts of COVID-19

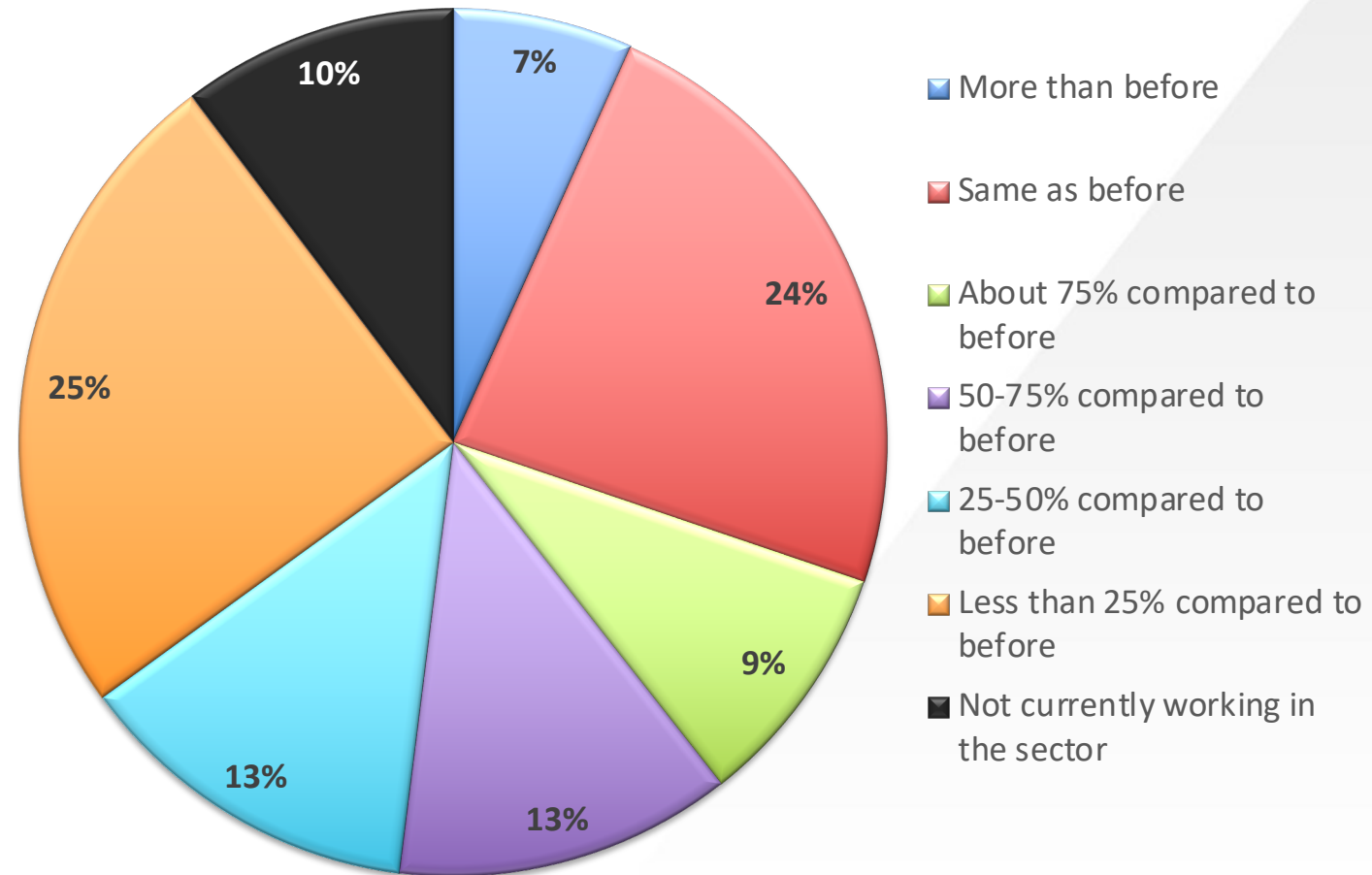
Impact of COVID-19 on arts and culture sector work

Compared to pre-COVID, how much are you currently working in the arts and culture sector?

- Overall, over two-thirds of Ontario artists or arts workers report working in the arts and culture sector less than before COVID-19, including 10% who are not working in the sector at all.

KEY INSIGHTS

- Results show no significant differences between demographic groups.

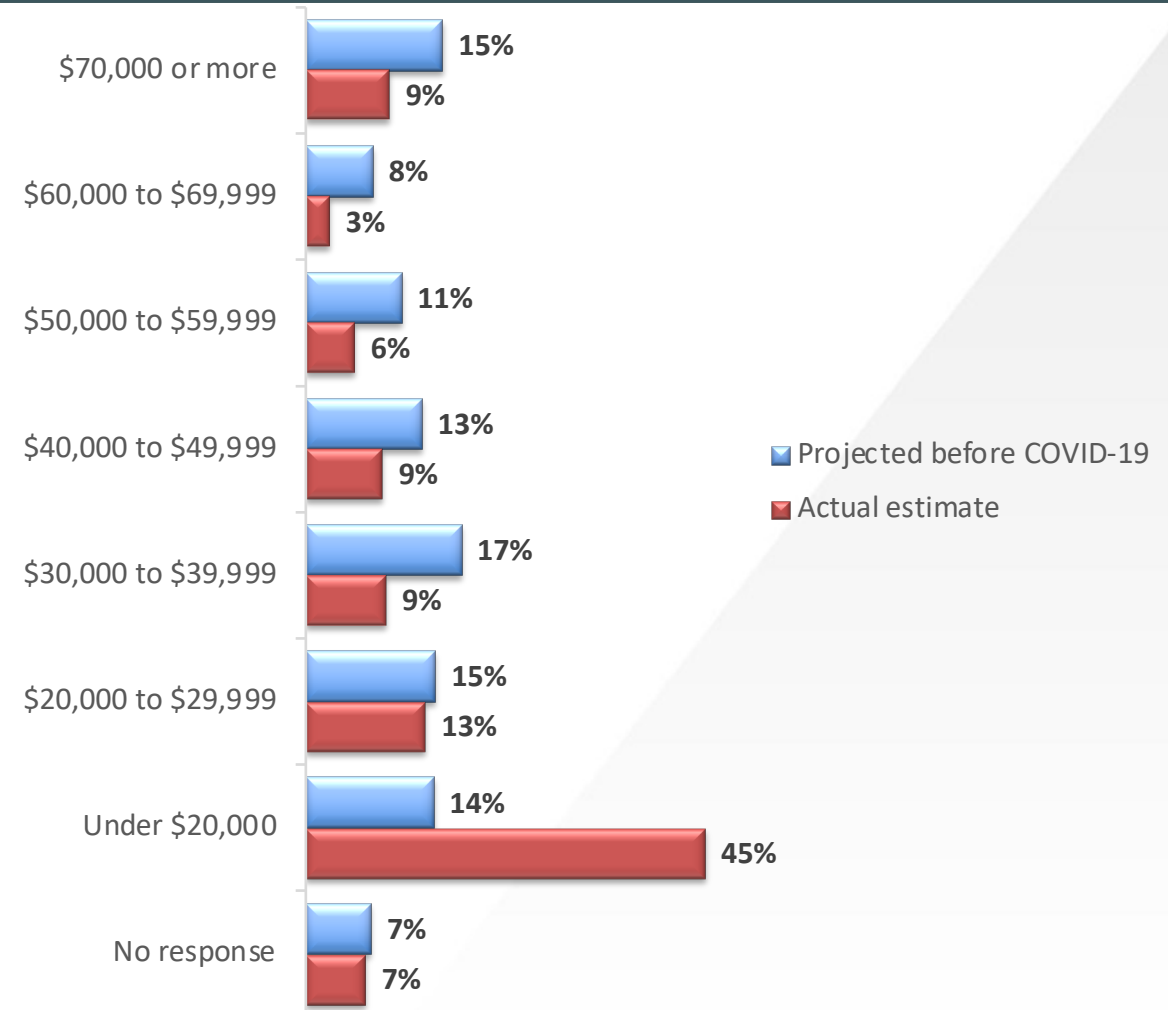


Impact of COVID-19 on 2020 personal income

Before COVID-19 hit, what were you originally projecting as your personal annual income for 2020?

What do you estimate your actual total annual income for 2020 will be (not including any government supports)?

- Ontario artists and arts workers' 2020 income seems to have been significantly impacted by COVID-19, as at least 67% of individuals reported a lower expected income than what they were originally projecting. Only 14% of respondents projected an income of less than \$20,000 before COVID-19 compared to 45% who currently estimate an income of under \$20,000.



Impact of COVID-19 on income from arts and culture sector

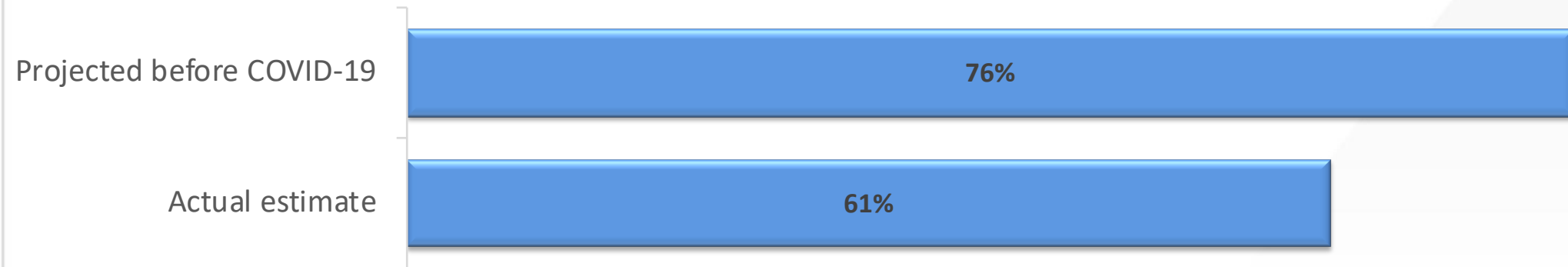
What percentage of your projected 2020 annual income was expected to come from the arts and culture sector?

What percentage of your actual 2020 annual income do you estimate will come from the arts and culture sector?

- Individuals projected three-quarters of their 2020 income would come from the arts and culture sector prior to COVID-19, compared to respondents now estimating less than two-thirds to come from the sector.

KEY INSIGHTS

- Those 65 and older expect less of their income to come from the arts and culture sector compared to younger respondents, both currently and prior to COVID-19.



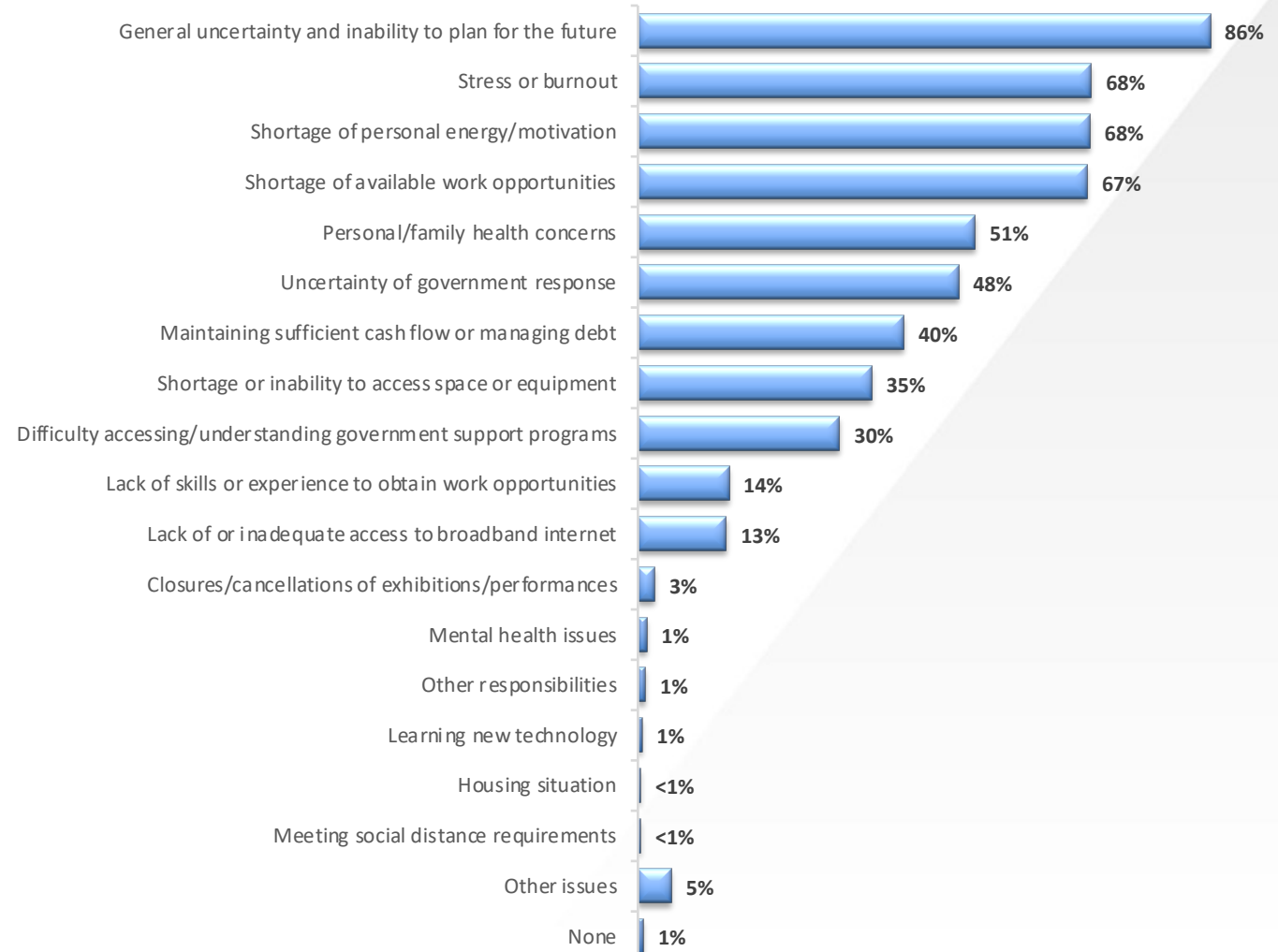
Obstacles faced in the last three months

Over the last three months, which of the following are obstacles you have faced?

- Almost all individuals say they have faced at least some barriers over the past three months, with the most common being *general uncertainty and inability to plan for the future*.
- Respondents also commonly mentioned impacts on their emotional wellbeing, such as *shortage of personal energy/motivation* and *stress or burnout*, as well as issues about the *shortage of available work opportunities*.

KEY INSIGHTS

- Younger respondents tend to be more likely to mention *general uncertainty and inability to plan for the future*.





Expectations over time

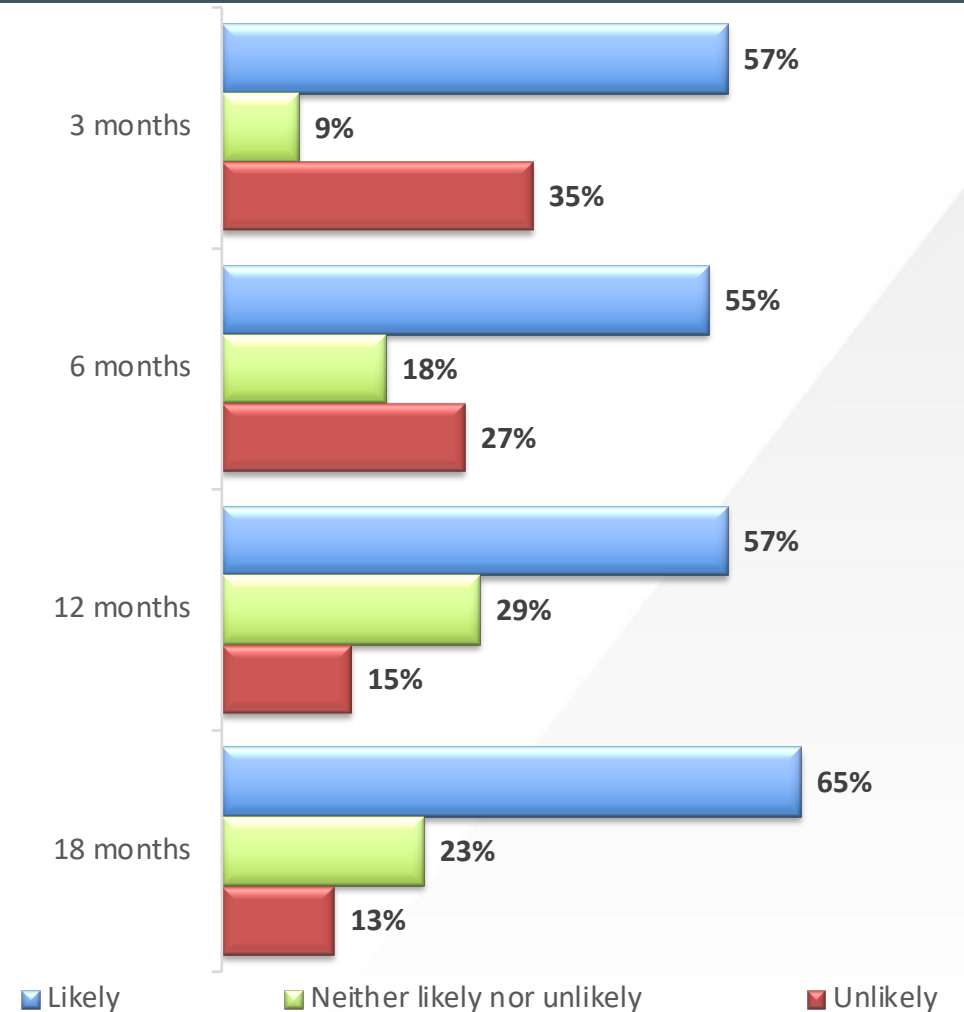
Likelihood of working in sector in the future

How likely do you expect to be working in the arts and culture sector in...?

- Over half of respondents expect to be working in the arts and culture sector in three months time, while about one-third say it is unlikely.
- Interestingly, the proportion of those who say they are likely to be working in the arts and culture sector 18 months from now is only 8 percentage points greater than compared to 3 months from now. However, those who say it is unlikely drops from 35% in 3 months to 13% in 18 months. This shows a lack of pessimism more so than the presence of optimism in terms of being able to continue work in the sector.

KEY INSIGHTS

- Results show no significant differences between demographic groups in terms of likelihood to be working in the arts and culture sector in the future.





Government supports

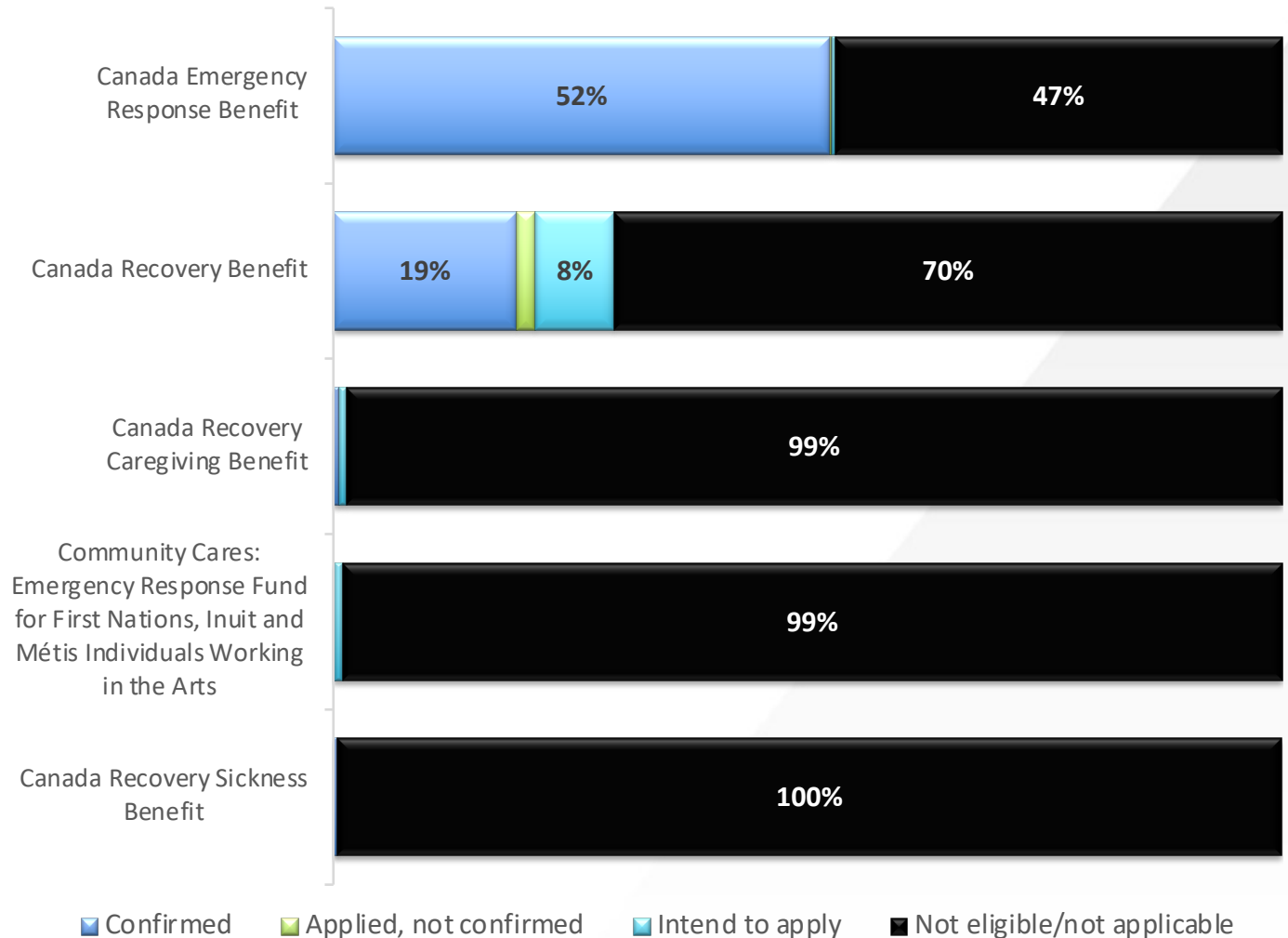
Accessing government supports

Which of the following government supports have you accessed or intend to access?

- About half of individuals applied for the *Canada Emergency Response Benefit* and about 1 in 5 applied for the *Canada Recovery Benefit*. Only 2% or fewer respondents applied or intend to apply for any of the other three programs.

KEY INSIGHTS

- Those 65 and older are much less likely than younger respondents to have applied for the *Canada Emergency Response Benefit*.



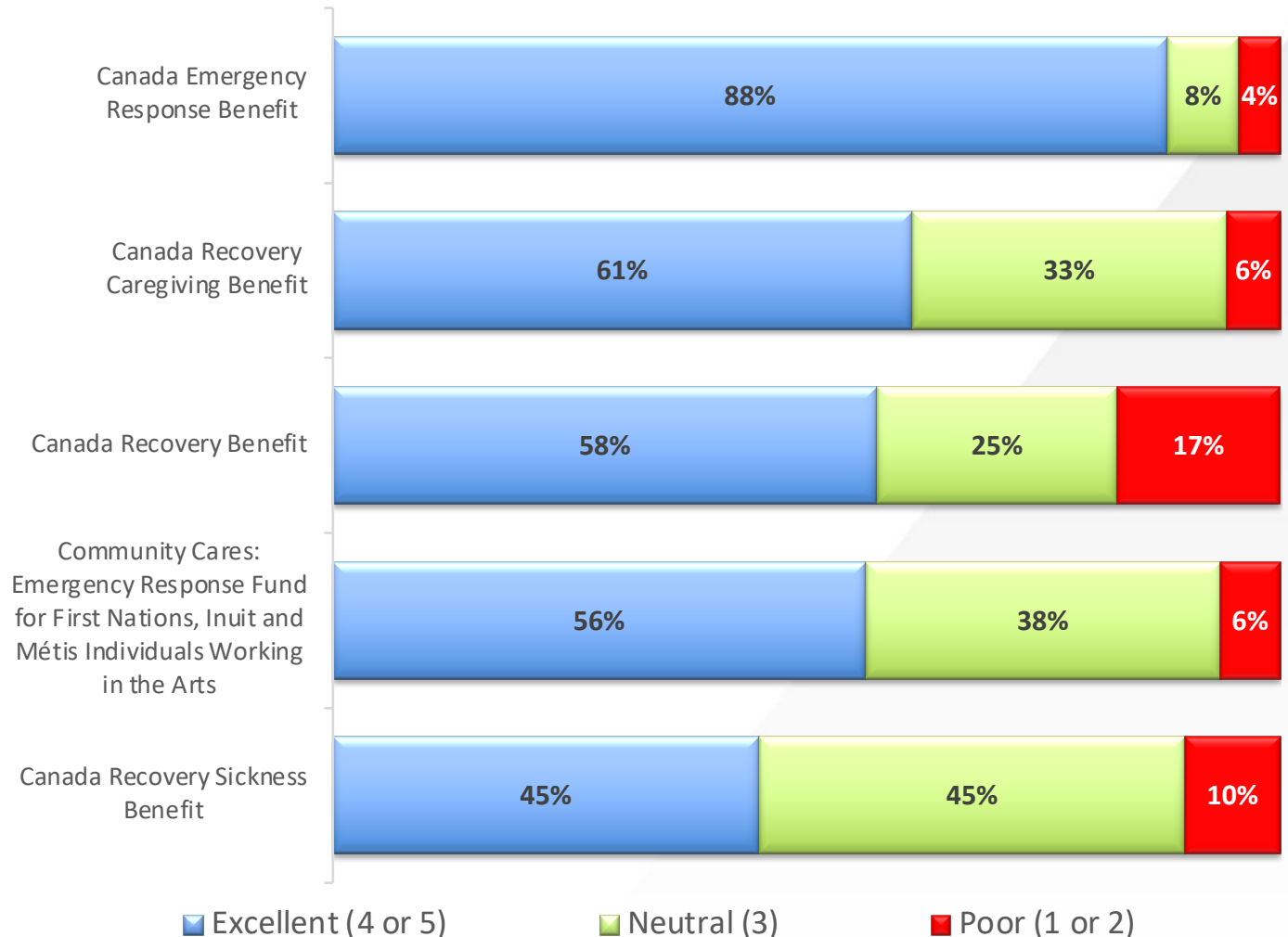
Perceptions of government supports

Please indicate your rating of the following government supports.

- Individuals are most positive about the *Canada Emergency Response Benefit*, however, very few respondents rated the other programs as the majority were ineligible or did not apply.

KEY INSIGHTS

- Results did not show any key differences by demographic groups.





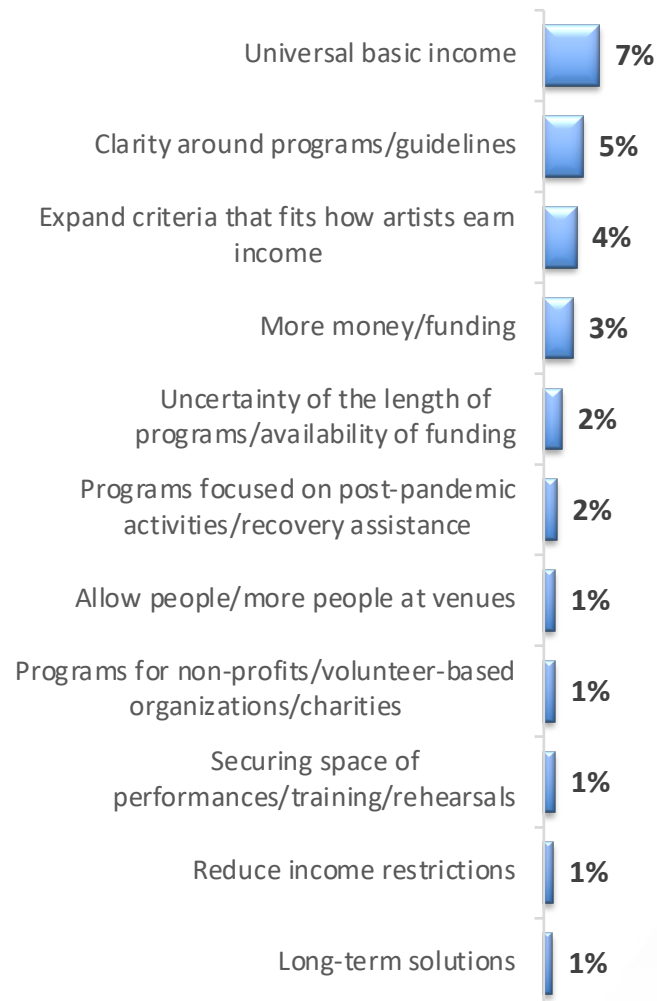
Comments on programs

- **Canada Emergency Response Benefit.** 22% provided comments about this program, most commonly saying they were *grateful for the program/was helpful* (8%), they were *ineligible because of the low income cap* (3%), or they were *worried or confused about paying it back* (3%).
- **Canada Recovery Benefit.** Only 11% of individuals provided comments about this program. The most common answers were that *they had issues with eligibility/complicated for artists* (3%), *people were grateful for the program* (2%), and *the benefit did not cover all lost income/was not a living wage* (2%).
- **Community Cares: Emergency Response Fund for First Nations, Inuit and Métis Individuals Working in the Arts.** Only five individuals provided comments about this program.
- **Canada Recovery Caregiving Benefit.** Only two individuals provided comments about this program.
- **Canada Recovery Sickness Benefit.** No individuals provided comments on this program.

Gaps in current government programs

What, if any, gaps do you still see that are not being addressed by the existing pandemic response programs? This could also include barriers to accessing certain programs, policies, restrictions, unclear guidelines, etc.

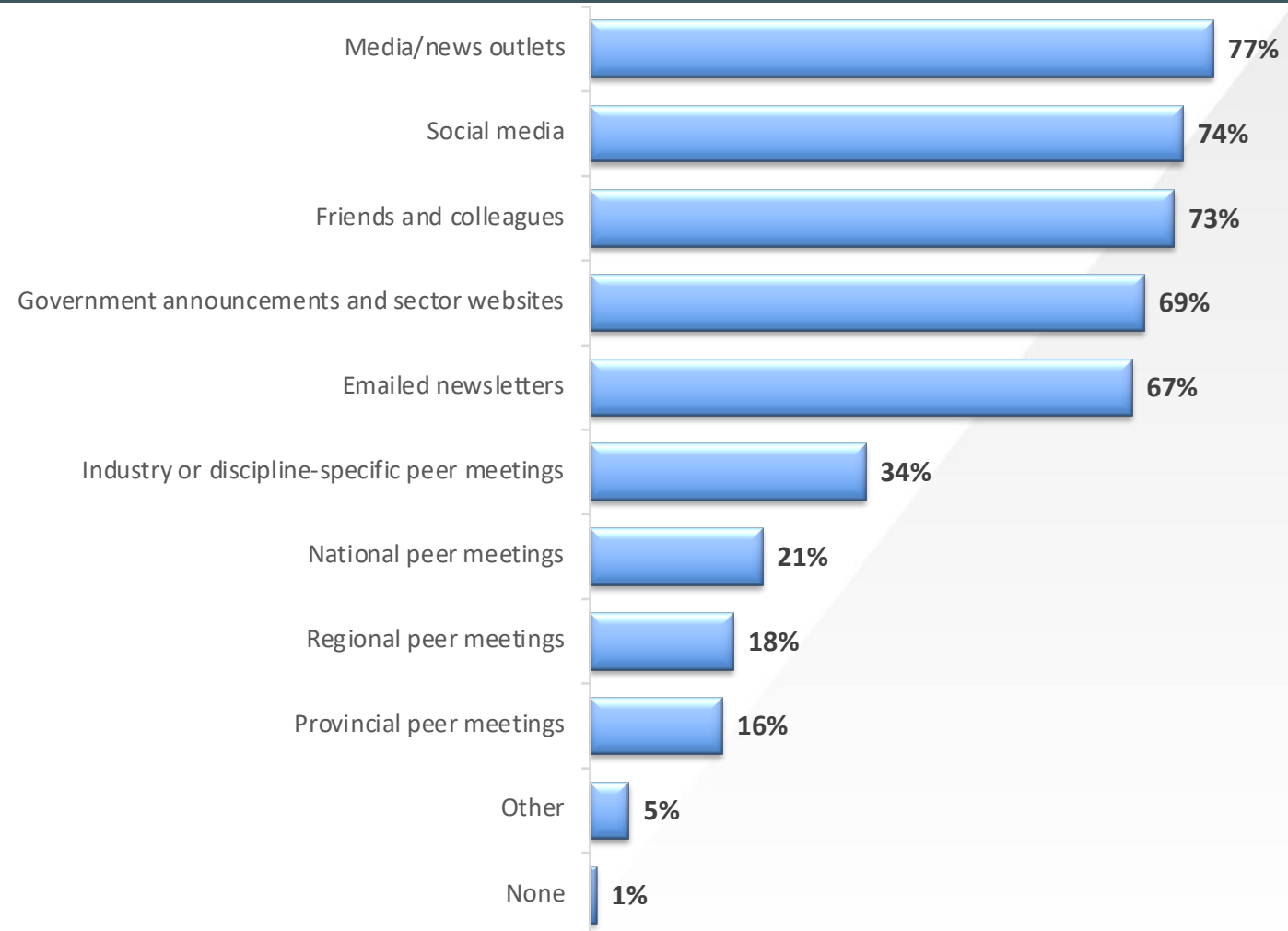
- When asked to comment on gaps, barriers, and so forth in the current slate of programs, almost half of respondents provided a comment; however, outside of suggesting a *universal basic income* (7%) no single issue seemed dominant, with several being mentioned by 1% to 5% of individuals.



Staying informed

How are you staying informed about sector and government announcements and updates?

- Almost all respondents are staying informed about announcements and updates, with a number of sources being used by at least two-thirds of individuals.
- Respondents most often stay informed through *media/news, social media, friends and colleagues, government announcements and sector websites, and emailed newsletters*.



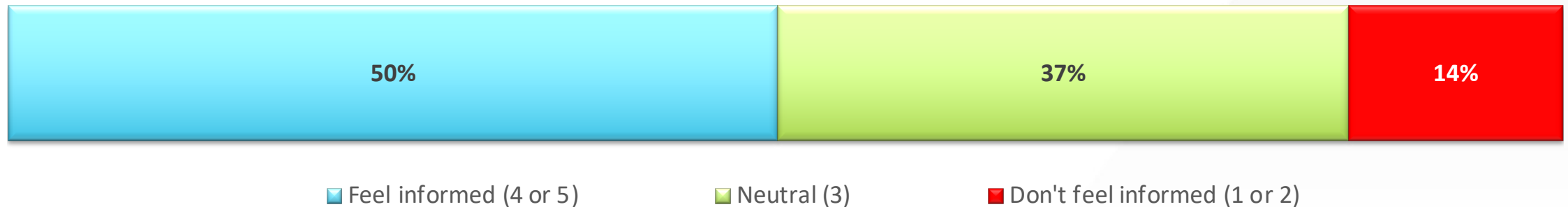
Feel informed about sector and government updates

To what extent do you feel informed about sector and government updates?

- About half of respondents report feeling informed about sector and government updates, with 14% indicating they don't feel informed.
- There is a strong relationship between feeling informed and the number of sources individuals report using (on the previous slide). For example, those that rate themselves a 5 out of 5 (very informed) report using 5.3 sources on average, whereas those who rate themselves a 1 out of 5 use 3.7 sources on average.

KEY INSIGHTS

- Although not quite of statistical significance, those ages 30 to 64 are more likely than those in the youngest (18 to 29) and oldest age cohorts (65 and older) to say they feel informed about sector and government updates.





Pivoting to digital programming

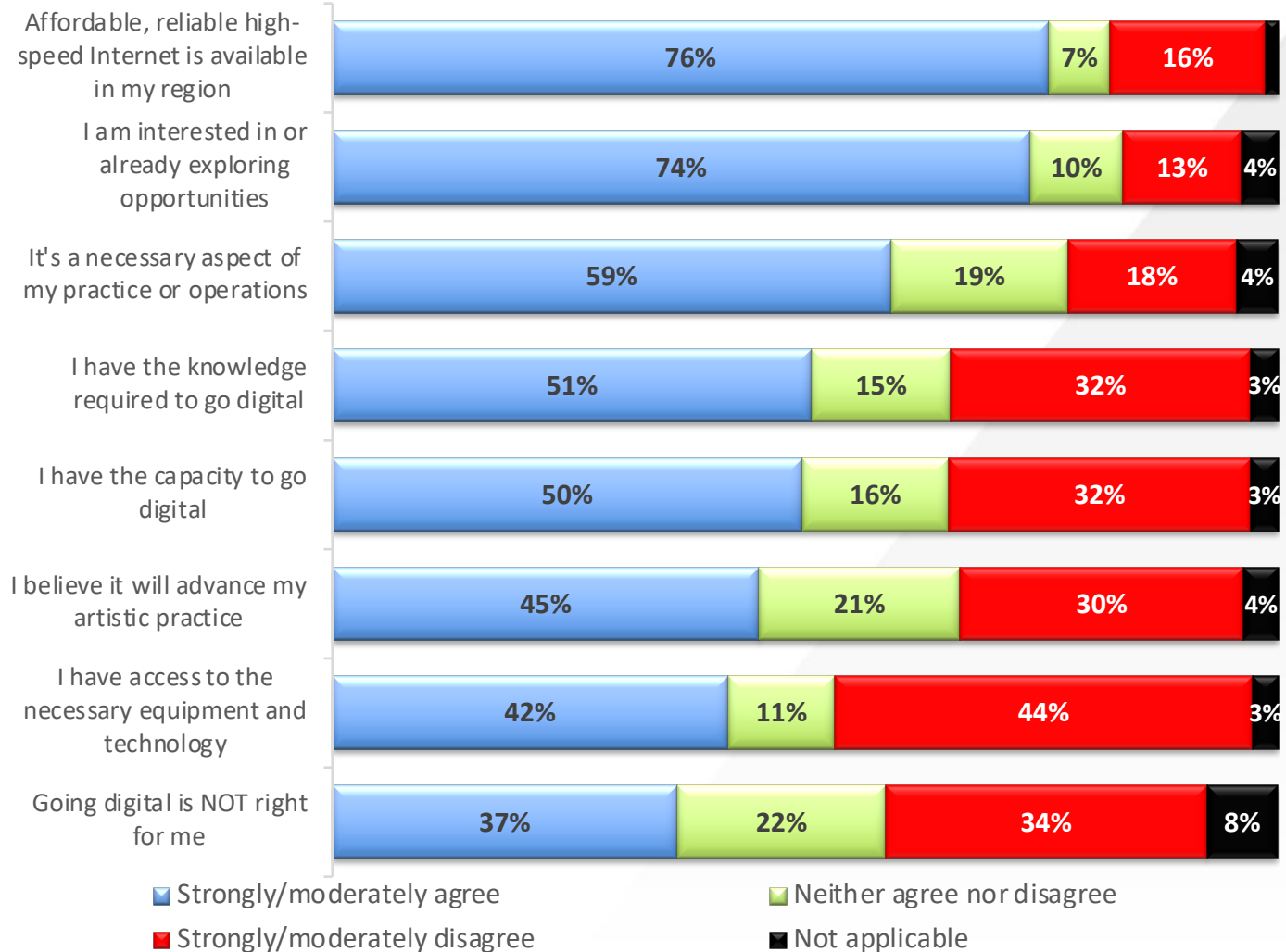
Pivoting to digital programming and practices

Regarding pivoting to digital programming and practices, how do each of these statements reflect your thoughts?

- When asked about digital programming and practices, respondents are most likely to agree that *affordable, reliable high-speed Internet is available in their region* and they are *interested in or already exploring opportunities*.
- Although about 3 in 4 respondents said they are interested in going digital, less than half agreed that *they have access to the necessary equipment and technology* or *believe it will advance their artistic practice*.
- Additionally, just over one-third of respondents in Ontario agreed that *going digital is not right for them*.

KEY INSIGHTS

- Results showed little difference between demographic groups.





Mental health and optimism

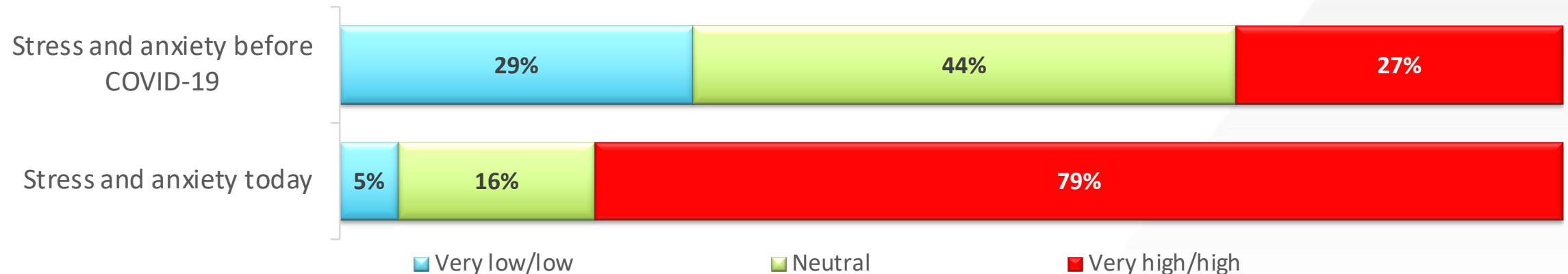
Stress and anxiety pre- and during COVID-19

How would you describe your...

- Nearly three times as many individuals report *very high* or *high* levels of stress and anxiety today as compared to before COVID-19. Even more telling is that just 3% reported *very high* levels pre-COVID-19 compared to 30% today.

KEY INSIGHTS

- Women were more likely than men to report high levels of stress and anxiety prior to COVID-19, however, the difference in stress levels reported today is minimal.
- Although not quite statistically significant, those 65 and older were less likely than younger respondents to report high levels of stress and anxiety, both before COVID-19 and today.



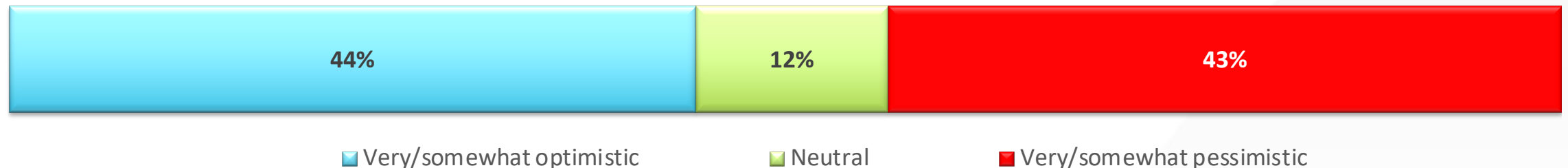
Optimism for recovery

As of today, how optimistic are you that the arts & culture sector across Canada will recover from the impacts of COVID-19?

- About 44% of individuals are at least somewhat optimistic that the arts and culture sector across Canada will recover from the impacts of COVID-19, including 12% who are very optimistic. This compares to 43% who are pessimistic, including 9% who are very pessimistic.

KEY INSIGHTS

- Results showed little difference between groups in terms of optimism about the ability of the arts and culture sector across Canada to recover.



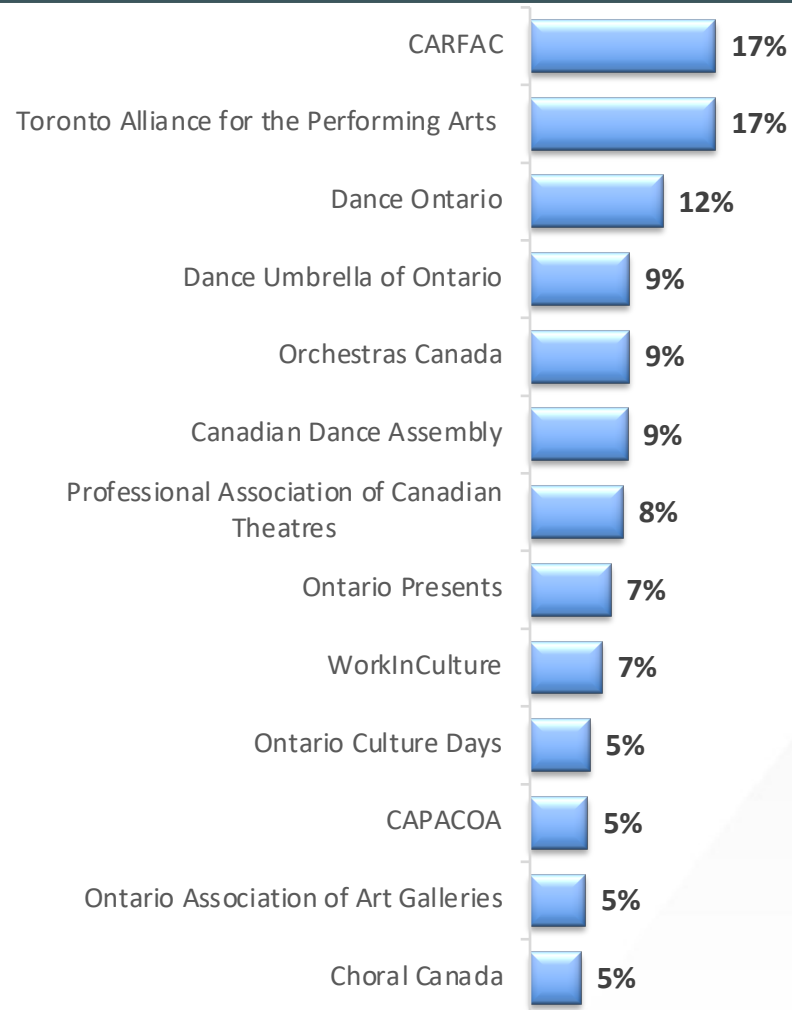


Profile of respondents

Arts organization affiliation

Which of the following arts service organizations do you have the closest affiliation with?

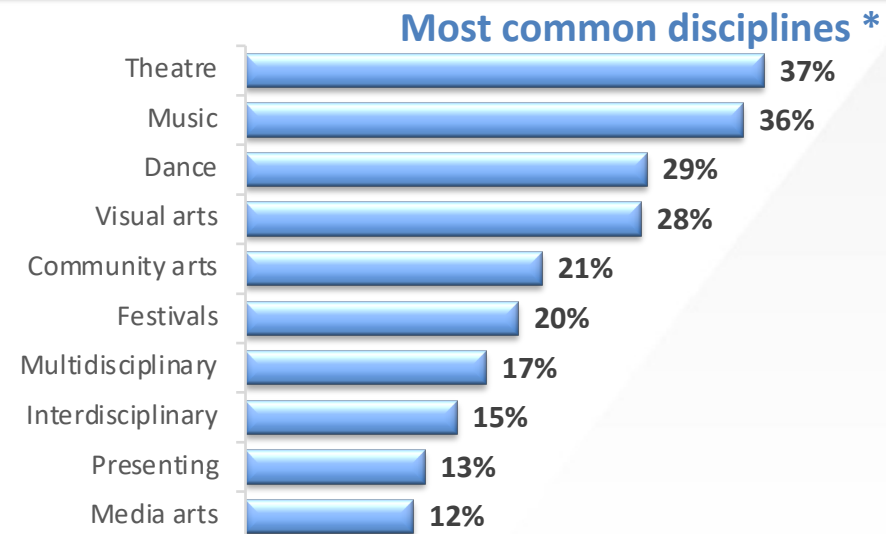
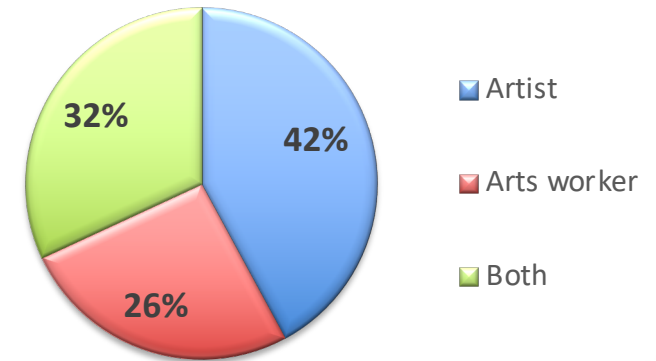
- Respondents could select from 32 different service organizations to whom they felt most affiliated. The graph to the right shows those organizations selected by at least 5% of respondents.



Artist information

What disciplines do you practice, work in, work with, represent?

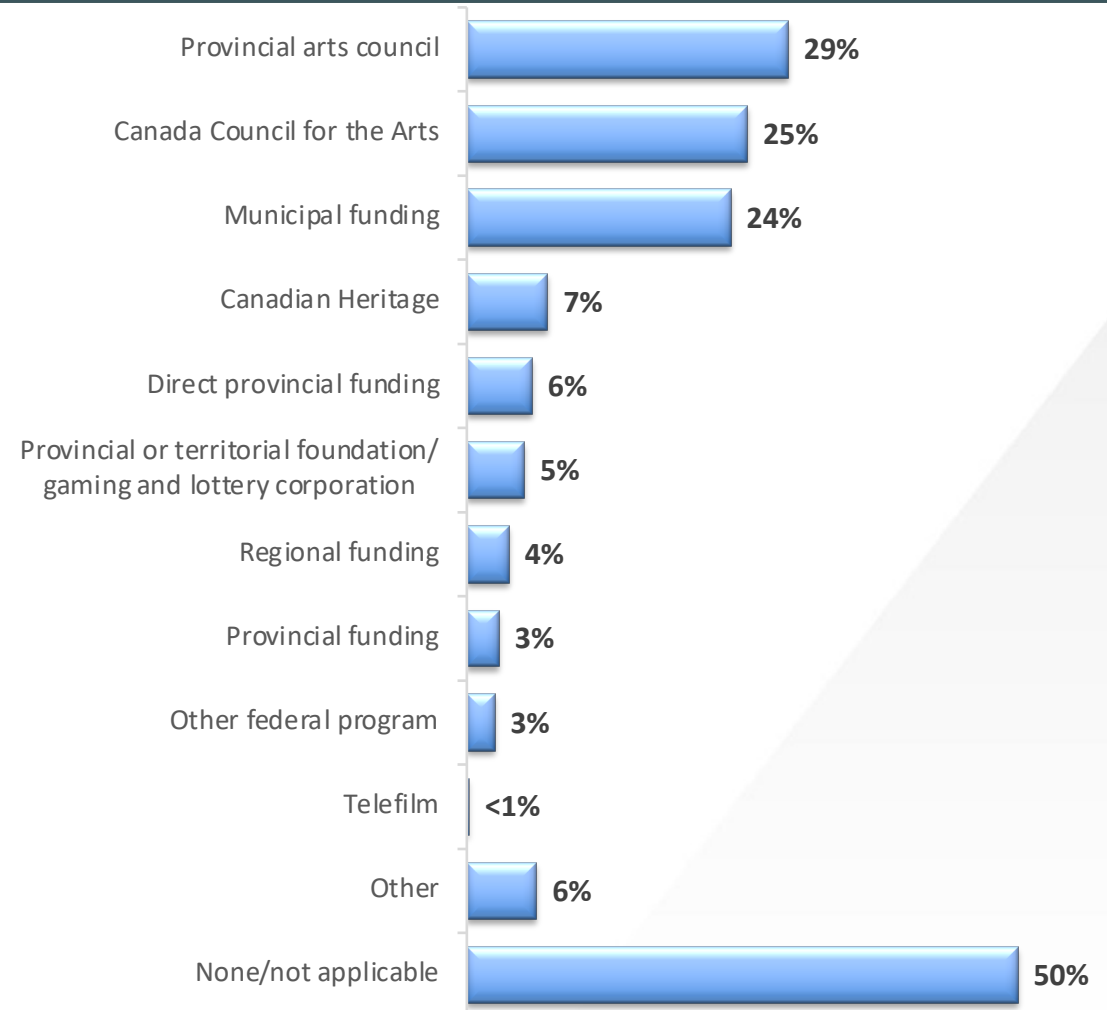
- Graphs on this page show the types of individuals that completed the survey.
- For disciplines, organizations could select from 17 different disciplines and the 10 most commonly selected are shown.



Funder

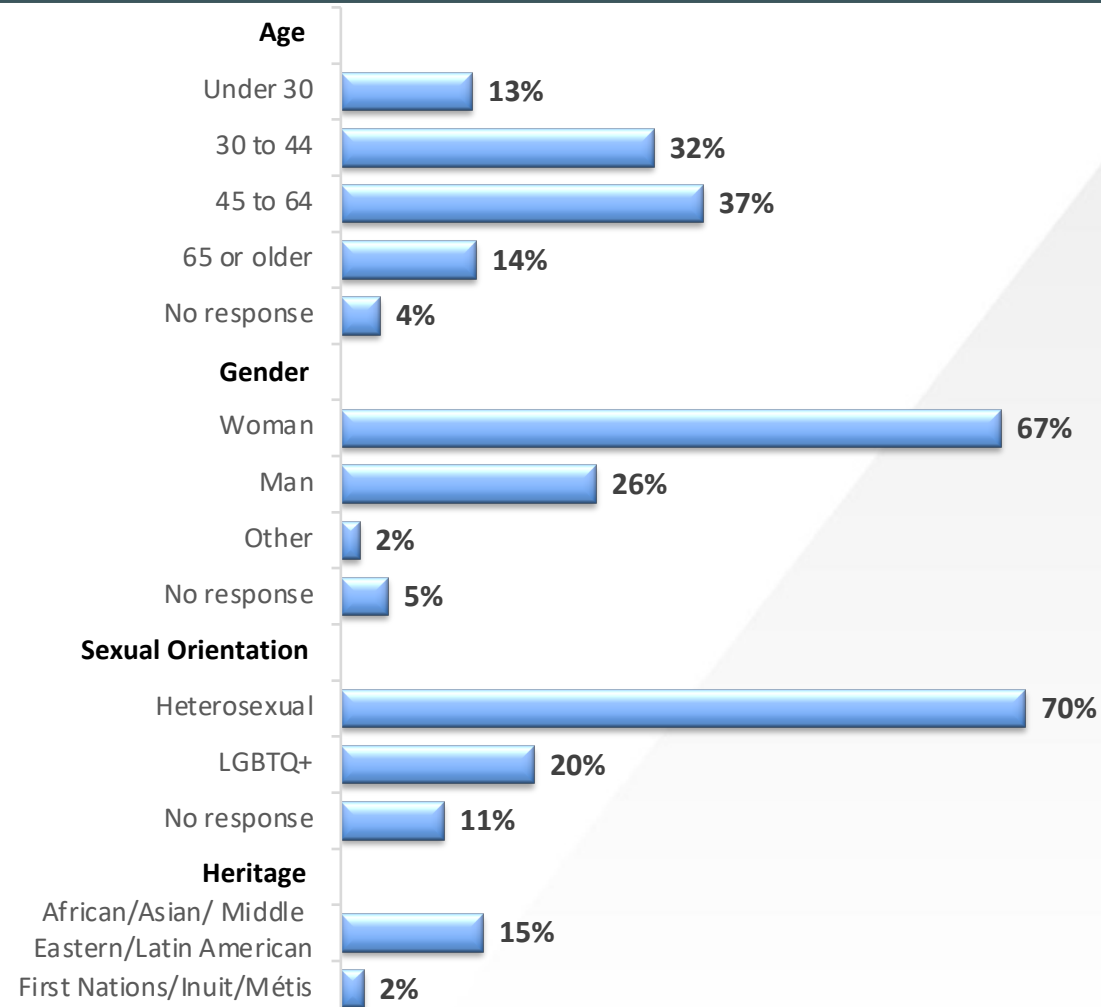
Select all the public agencies you have received funding or support from at least once between 2018 and 2020.

- Individuals' funding bodies can be seen on the right, with about half receiving some sort of funding. The majority of funding received came from the following three sources between 2018 and 2020: *provincial arts councils, Canada Council for the Arts, and municipal funding.*



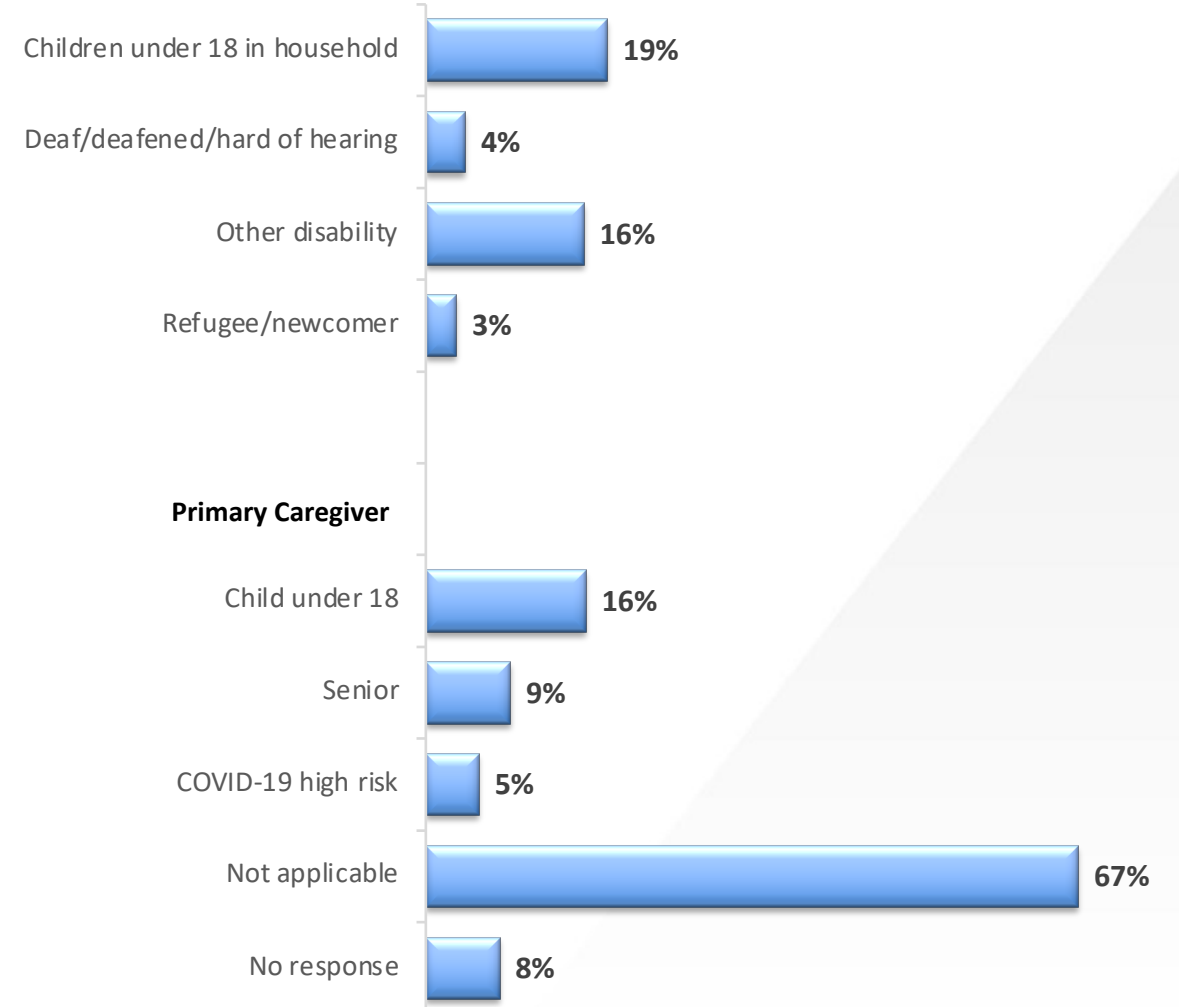
Individual demographics

- Artists and arts workers in Ontario are primarily women between the ages of 30 and 64.



Other demographics

- The chart to the right displays other demographic characteristics of the survey respondents.



Experience in arts and culture sector

*How many years have you worked in the arts and culture sector, and/or engaged in an artistic practice?
How would you self-identify your level of experience in your...?*

- On average, individuals in Ontario have been working in the arts and culture sector and/or engaged in an artistic practice for 21 years.
- The majority of respondents are either established in their arts practice/work or mid-career.

