



# NATIONAL ARTS AND CULTURE IMPACT SURVEY

---

## ENQUÊTE NATIONALE SUR LES RÉPERCUSSIONS DANS LE SECTEUR CULTUREL

### NATIONAL ARTS AND CULTURE IMPACT SURVEY: INDIVIDUAL REPORT

January 2021

**Contact:**

Nicholas Borodenko, Partner

[borodenko@pra.ca](mailto:borodenko@pra.ca)

204-594-2080



# 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 organizations from November 3 to 23, 2020.
- In total, 1,273 individuals from across Canada 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

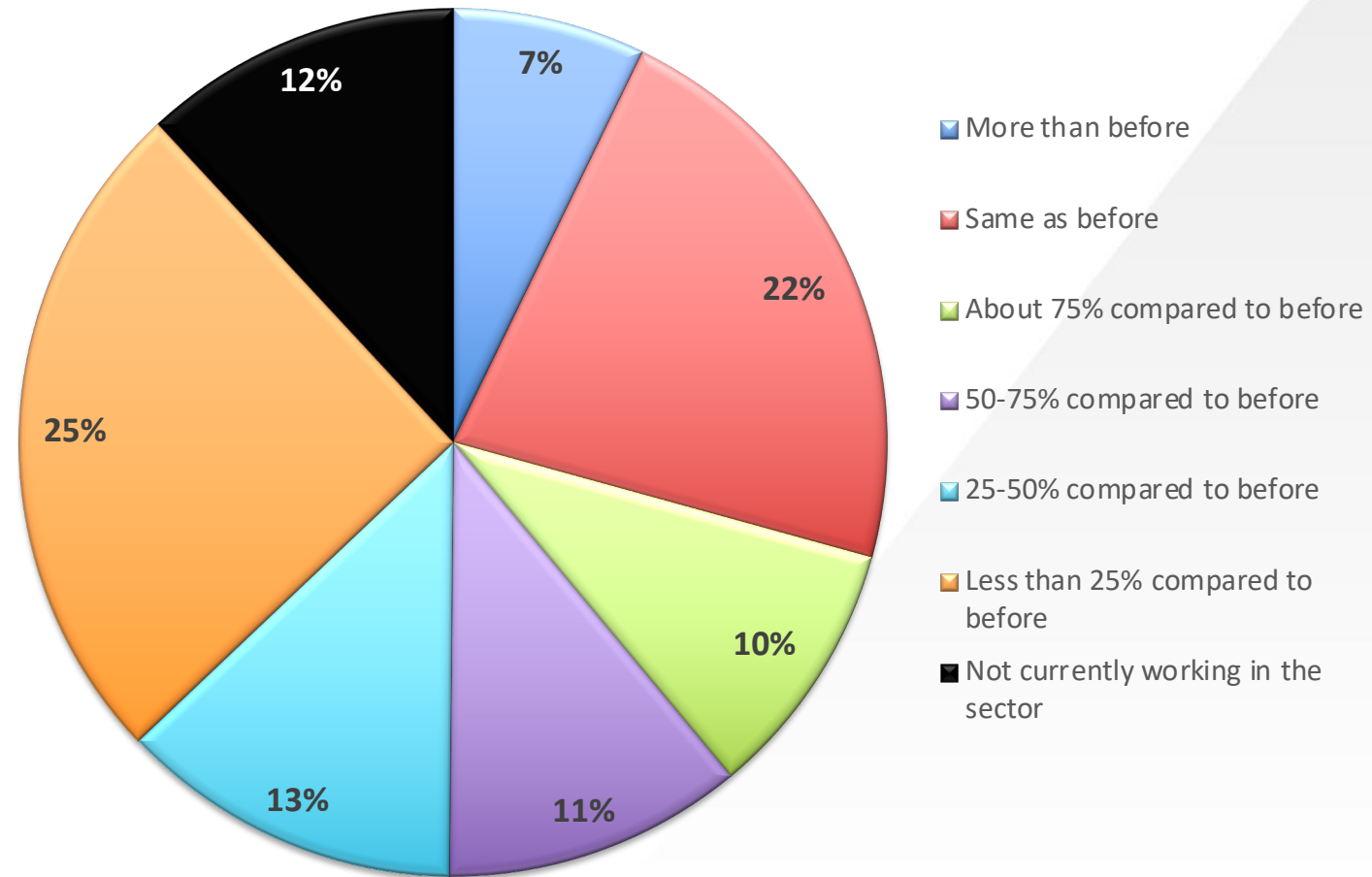
# Impact of COVID-19 on arts and culture sector work

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

- Overall, nearly three-quarters of Canadian artists or arts workers report working in the arts and culture sector less than before COVID-19, including 12% who are not working in the sector at all.

## KEY INSIGHTS

- Results show no significant differences between demographic groups.



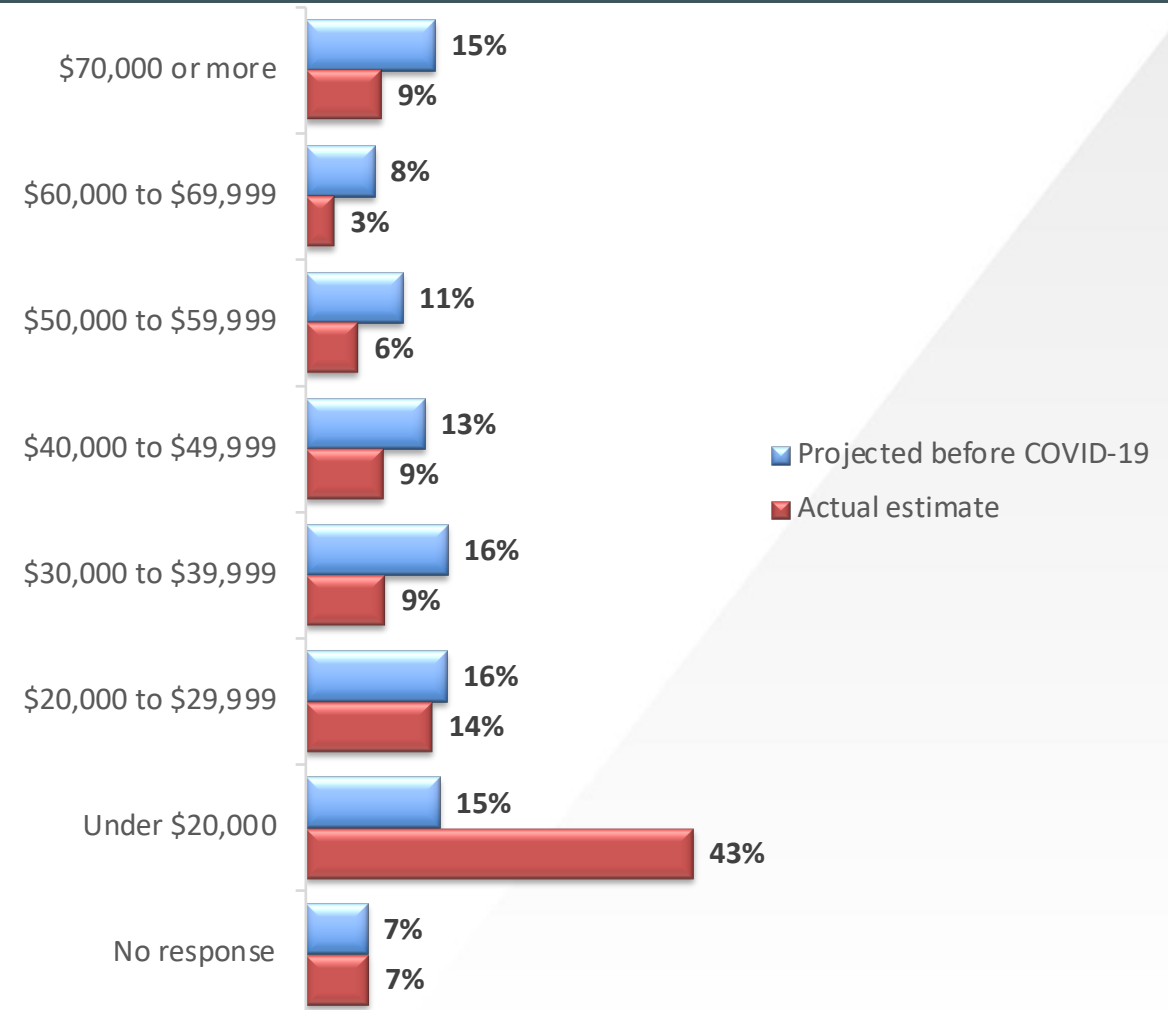


# Impact of COVID-19 on 2020 personal income

*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)?*

- Canadian artists and arts workers' 2020 income seems to have been significantly impacted by COVID-19, as at least 68% of individuals reported a lower expected income than what they were originally projecting. Only 15% of respondents projected an income of less than \$20,000 before COVID-19 compared to 43% who currently estimate an income of under \$20,000.



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

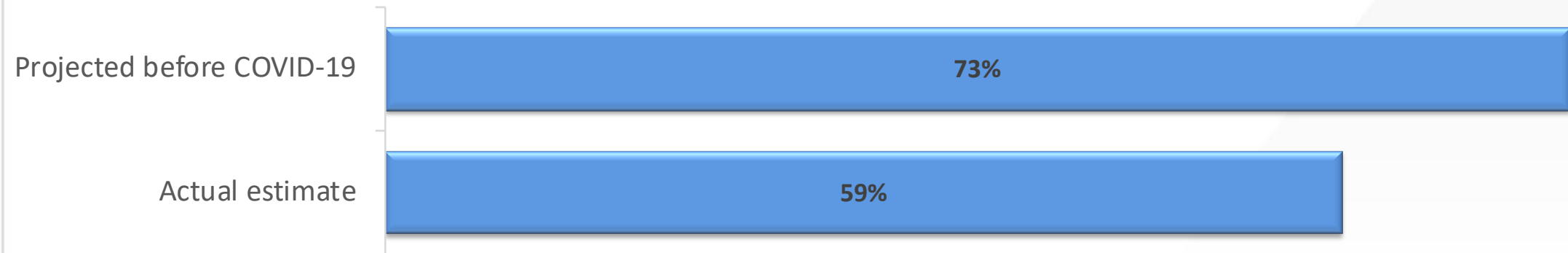
*What percentage of your projected 2020 annual income was expected to come from the arts and culture sector?*

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

- Individuals projected nearly 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

- Prior to COVID-19, those in Ontario, Quebec, and the Atlantic provinces, as well as those under 65, were projecting more of their 2020 income to come from the arts and culture sector compared to their counterparts.
- Today, those in Quebec and those under 65 expect more of their 2020 income to have come from the sector.



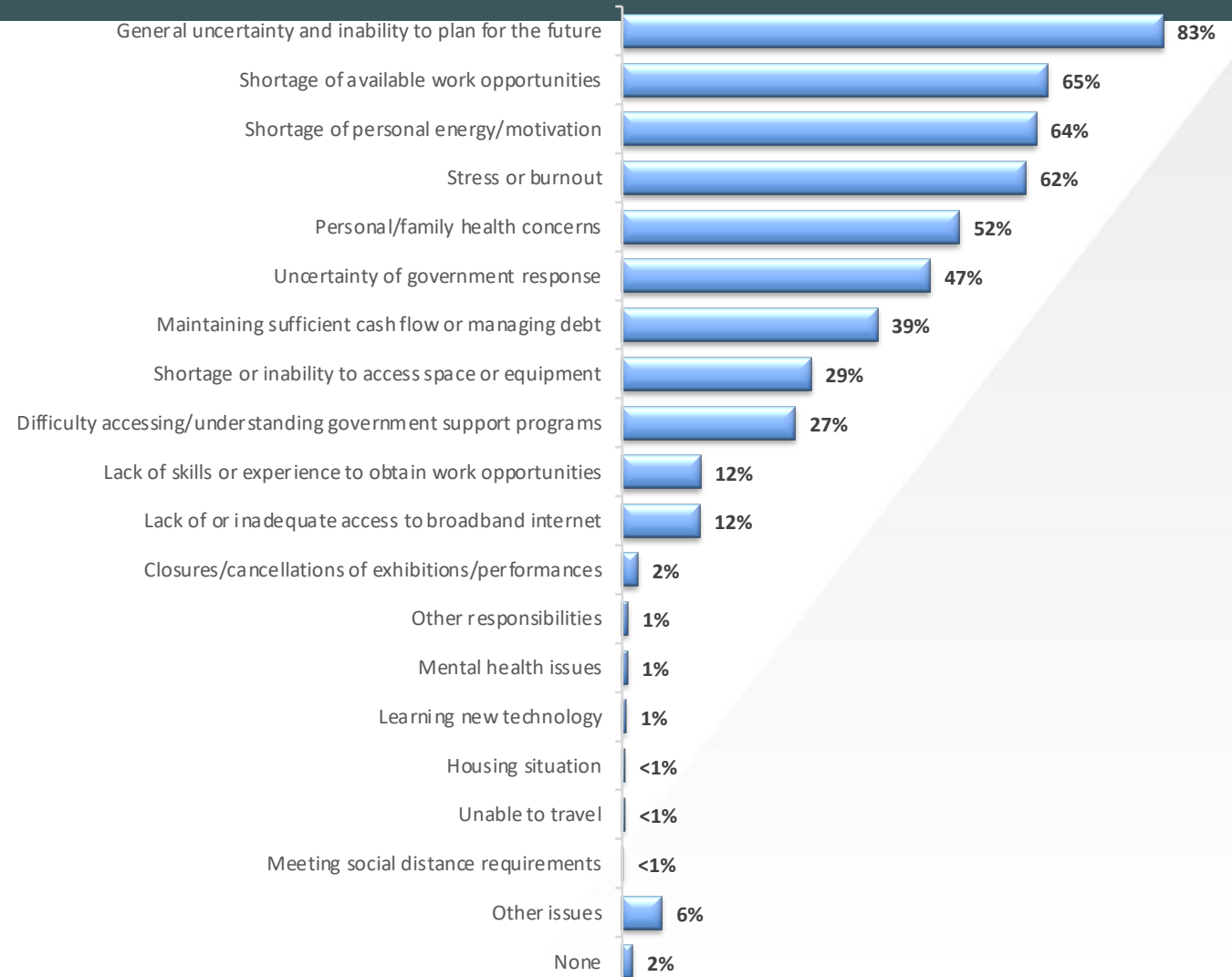
# Obstacles faced in the last three months

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 *shortage of available work opportunities* and impacts on their emotional wellbeing, such as *shortage of personal energy/motivation* and *stress or burnout*.

## KEY INSIGHTS

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





# Expectations over time

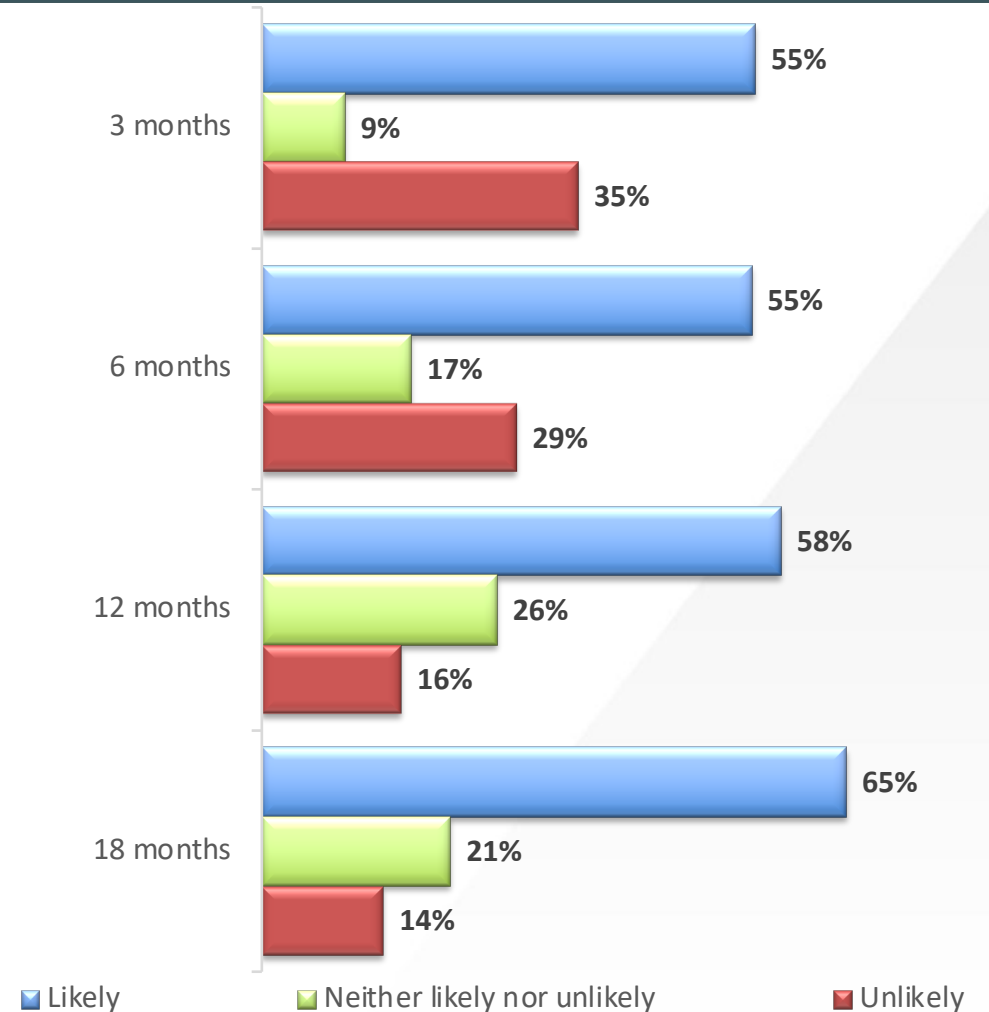
# Likelihood of working in sector in the future

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

- Just 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 10% greater than compared to 3 months from now. However, those who say it is unlikely drops from 35% in 3 months to 14% 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

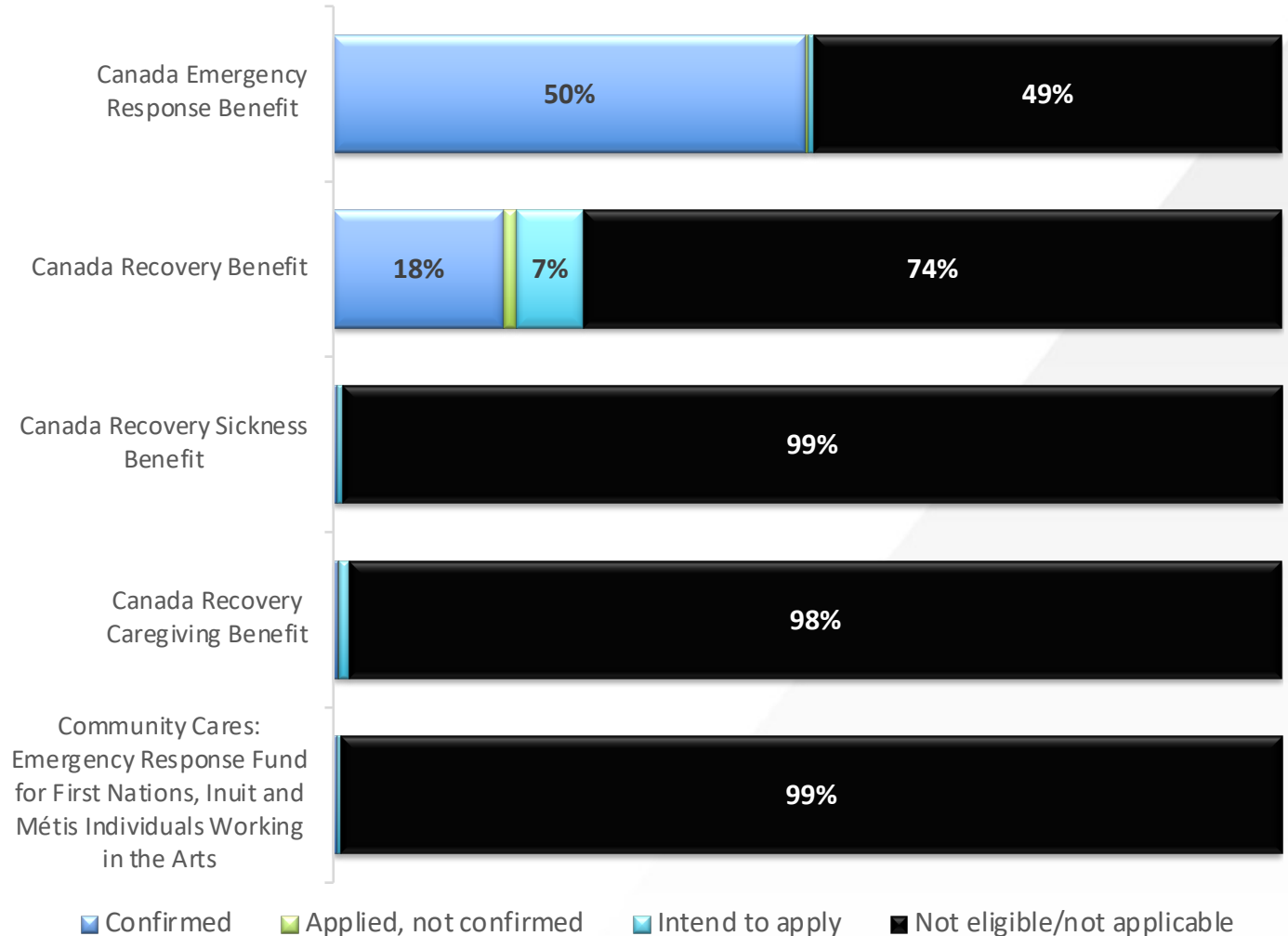
# Accessing government supports

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 about 1% or 2% of respondents applied or intend to apply for 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*.



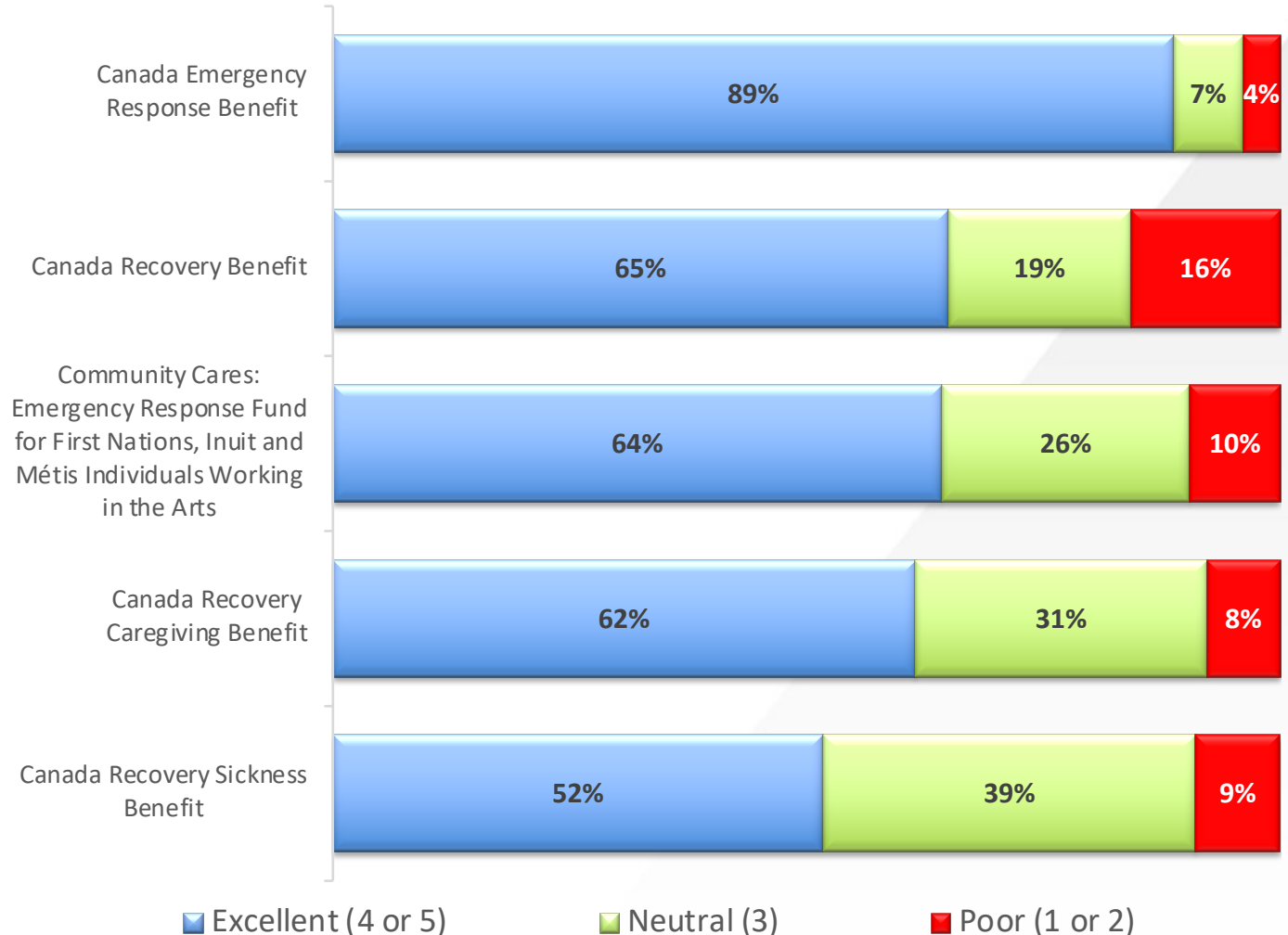
# Perceptions of government supports

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

- Respondents 45 and older tended to be more likely than younger respondents to give the *Canada Recovery Benefit* a positive rating.







# Comments about Canada Emergency Response Benefit

- 22% provided comments about this program, most commonly saying *it is a great program* (9%), *it is very easy to access/understand* (3%), or they were *ineligible because of the low income cap* (3%). Below are comments from individuals, highlighting some of the common themes.

*“An excellent emergency response which was created under great pressure and uncertainty.”*

*“The government was able to increase and pay all benefactors in time. Excellent on the path [sic] of the government.”*

*“The process to apply for and receive was easy for me. That they allowed some earnings (up to \$1,000 per month) was helpful, because a few video/online opportunities trickled in and it would have been a shame to have had to turn down these few small opportunities.”*

*“The rules surrounding eligibility actively dis-incentivized arts and culture workers from hustling to find alternative sources of income within the sector (teaching online, starting a new business segment, alternative pivots) because of the earnings limit. I believe this slowed down our overall ability to innovate and recover quickly as a sector.”*



# Comments about Canada Recovery Benefit

- Only 10% provided comments about this program, most commonly saying *the eligibility requirements were unclear/confusing (2%), the eligibility requirements were too complicated for artists (2%), and the program did not cover enough lost income (2%).*

*“I feel very confused about whether or not I qualify for CRB, as I am a professional artist who also often makes money via means other than art. Am I self-employed if I have part-time work in the service industry? Am I going to be guilty of fraud for accepting CRB when all of my income as an artist for this year has evaporated but I've been able to replace it with something else?”*

*“Particularly essential for those working in the arts "gig" economy, where fluctuations in annual income can differ greatly. However, I believe the eligibility should be extended beyond the past two years of generated income, as some writers I know might not have made \$5,000 this year or last year but are still dedicated professionals -- a five year net would be more fair.”*

*“It is hard to make ends meet with only \$900 per two-week cycle. I doubt most artists can get by with such a small amount. Does the federal government truly understand how artists make a living? Does it understand that artists are having a hard time getting by as most activities have been cancelled or postponed?”*



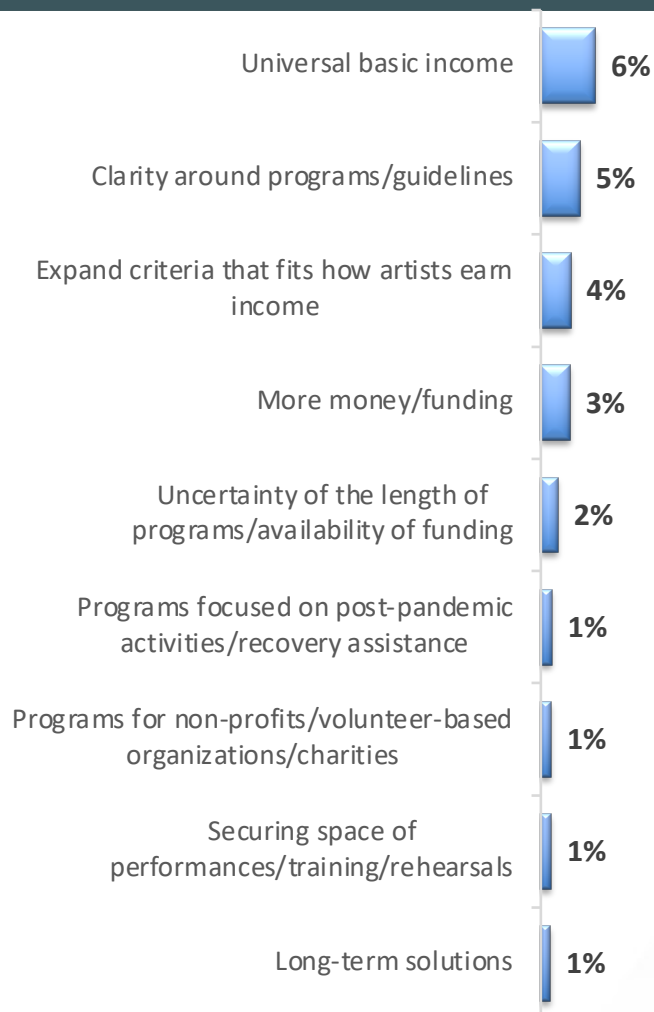
# Comments on other programs

- **Community Cares: Emergency Response Fund for First Nations, Inuit and Métis Individuals Working in the Arts.** Only 1% provided comments about this program.
- **Canada Recovery Caregiving Benefit.** Only five individuals provided comments about this program.
- **Canada Recovery Sickness Benefit.** Only three 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.*

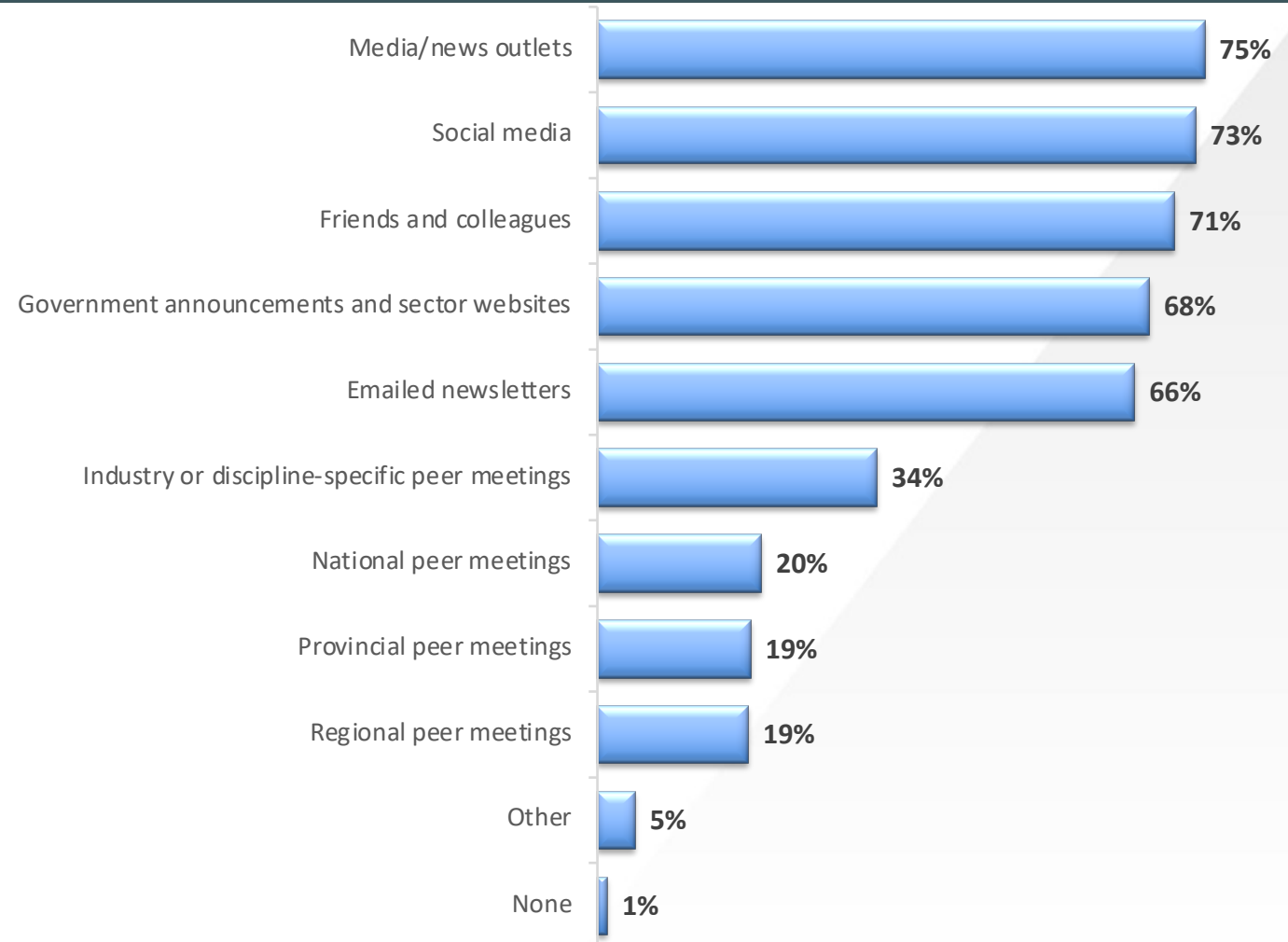
- When asked to comment on gaps, barriers, and so forth in the current slate of programs, almost half of respondents provided a comment; however, no single issue seemed dominant, with several being mentioned by 1% to 6% of individuals.



# 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*.



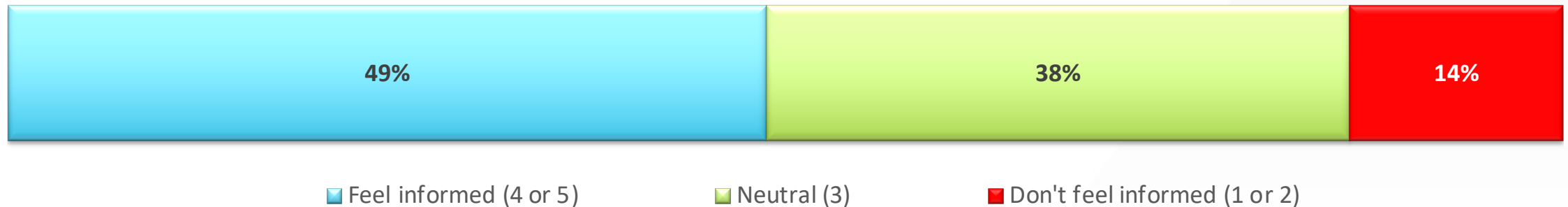
# Feel informed about sector and government updates

*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 5.5 sources on average, whereas those who rate themselves a 1 out of 5 use 2.9 sources on average.

## KEY INSIGHTS

- Men, those 30 to 64 years old, and those who do not identify as Indigenous are more likely than their counterparts to say they feel informed about sector and government updates.



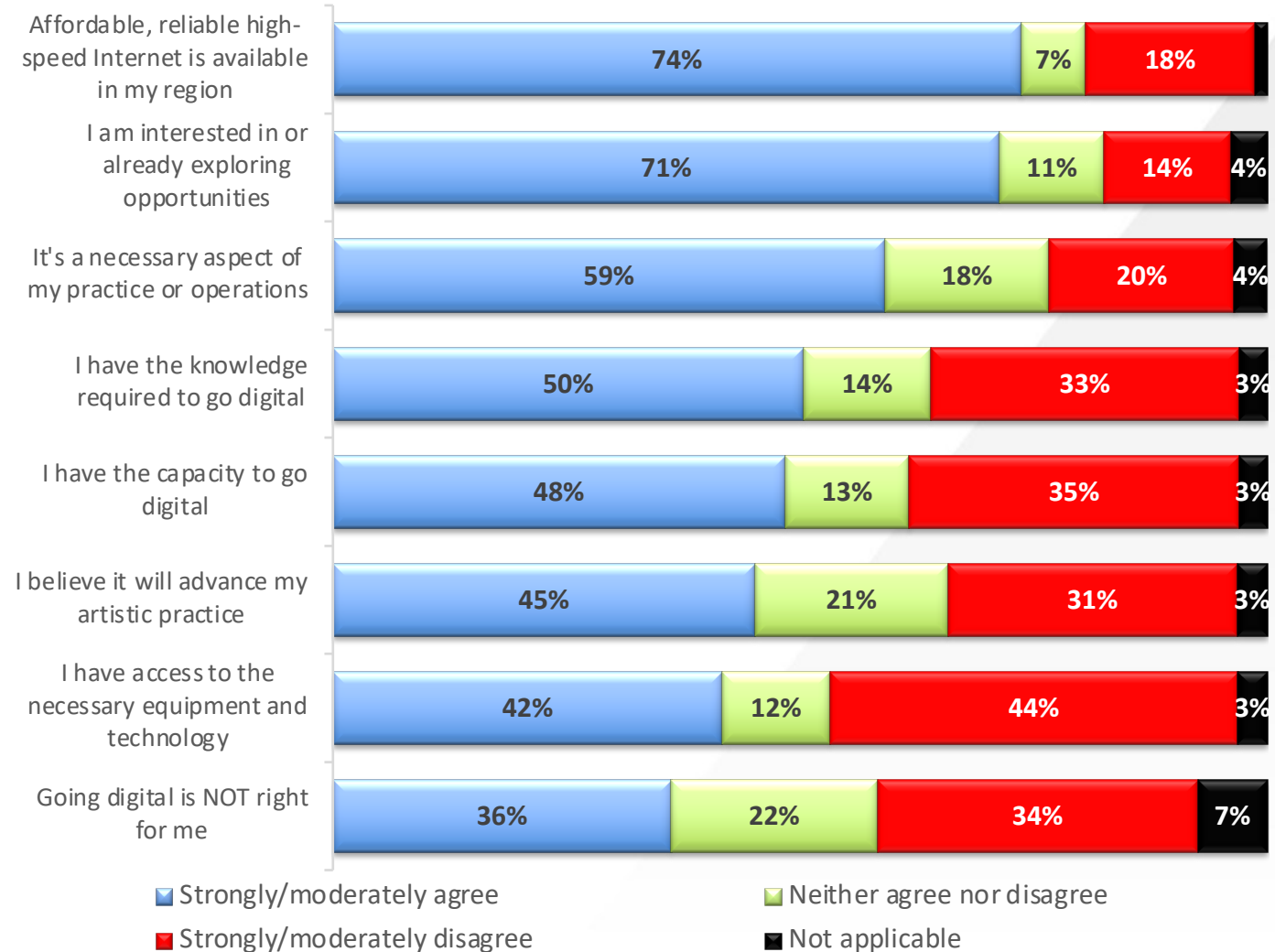


# Pivoting to digital programming

# 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 interest and knowledge may be there, access appears to be an issue, as respondents are least likely to agree that *they have the necessary equipment and technology*.







# Pivoting to digital programming and practices

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

## KEY INSIGHTS

Although falling just outside the threshold for statistical significance, results show the following:

- Respondents in Quebec are less likely than those in other regions to agree that digital programming and practices *will advance their artistic practice or is a necessary aspect of their practice or operations* and more likely to agree that *going digital is not right for them*, although the latter falls just outside statistical significance.
- Those in Quebec and those 65 and older are least likely to agree they are *interested in or already exploring opportunities*.
- The younger the respondent, the more likely they are to agree that they *have the knowledge required to go digital or have the capacity to go digital*.
- Women are more likely than men to *disagree* that they *have the knowledge required to go digital or have access to the necessary equipment and technology*.



# Mental health and optimism

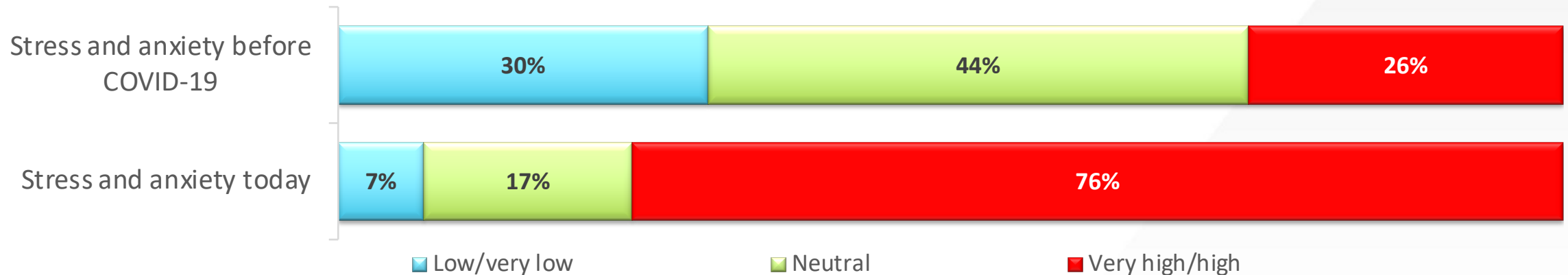
# Stress and anxiety pre- and during COVID-19

*How would you describe your...*

- Over 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

- Those 65 and older are less likely than younger respondents to report high levels of stress and anxiety, both before COVID-19 and today.
- 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.



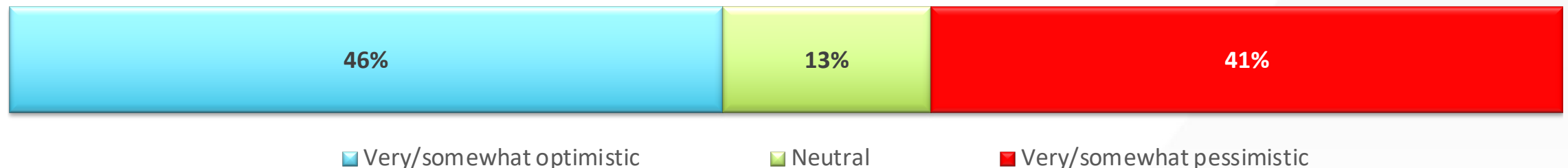
# Optimism for recovery

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

- Nearly half of individuals are at least somewhat optimistic that the arts and culture sector across Canada will recover from the impacts of COVID-19, including 10% who are very optimistic. This compares to 41% 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.

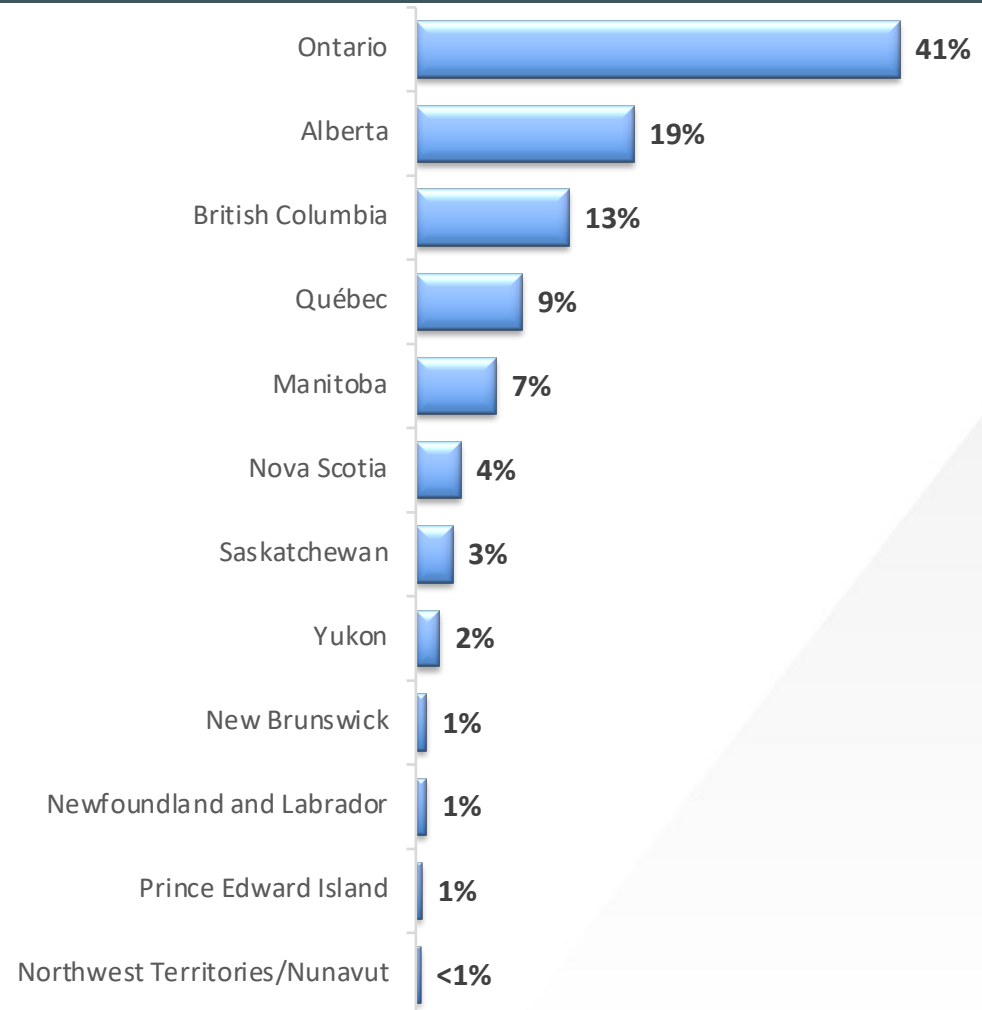




# Appendix A - Profile of respondents

# Province

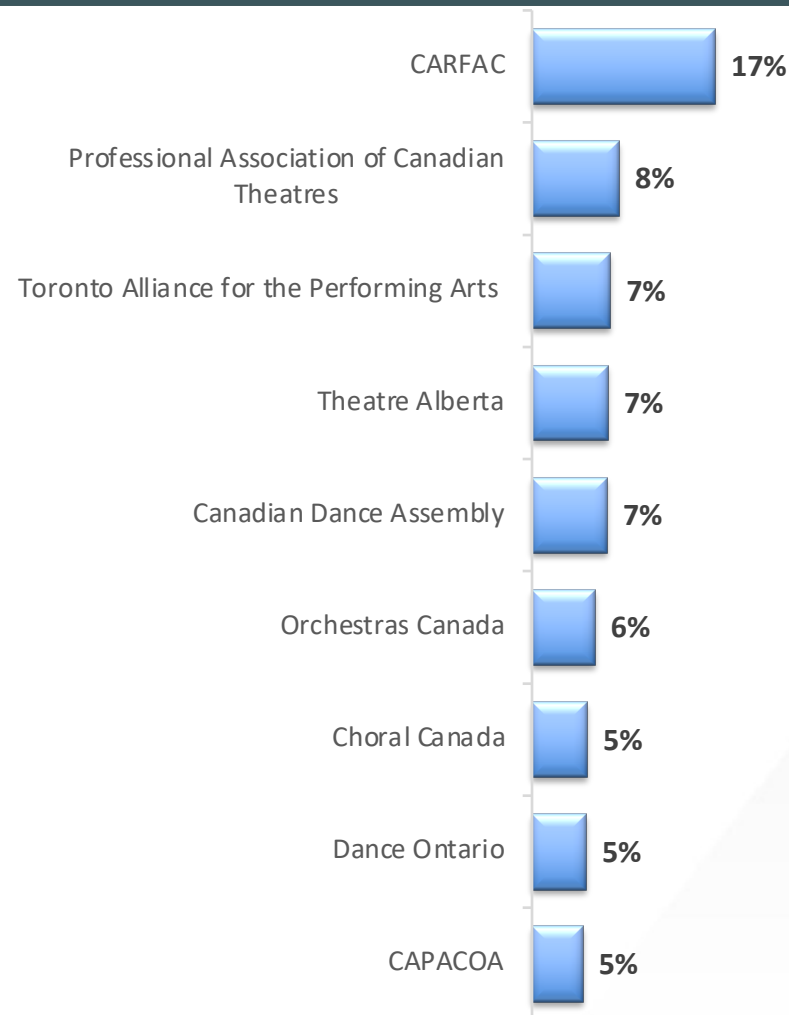
- There is no perfect proxy to assess the distribution of responses by province and territory. However, compared to the geographic distribution of artists in the 2016 census, there appears to be under-representation in Quebec (22% of artists in the 2016 census compared to 9% of responding individuals) and British Columbia (18% of artists in the 2016 census compared to 13% of responding individuals).



# Arts organization affiliation

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

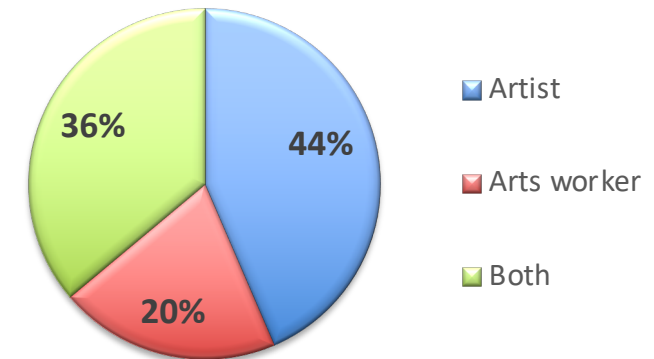
- Respondents could select from 32 different service organizations to whom they felt most affiliated. The graph to the right shows those organizations selected by at least 5% of respondents.



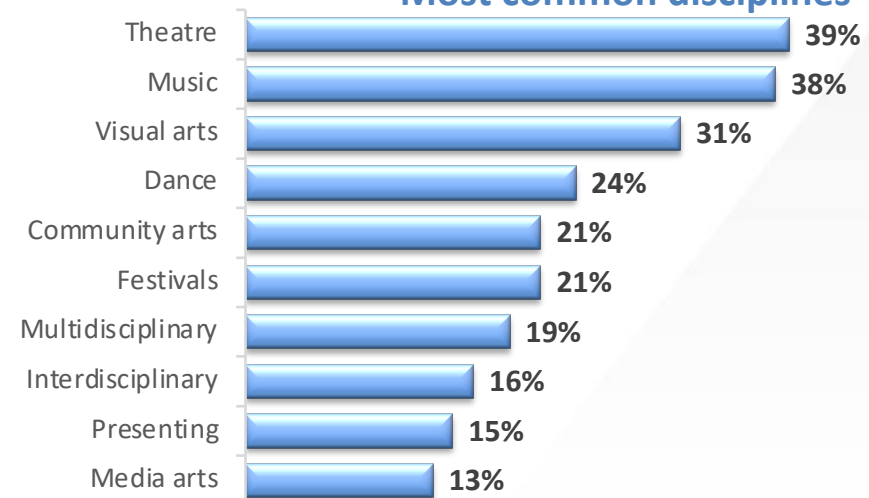
# Artist information

*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.



## Most common disciplines \*

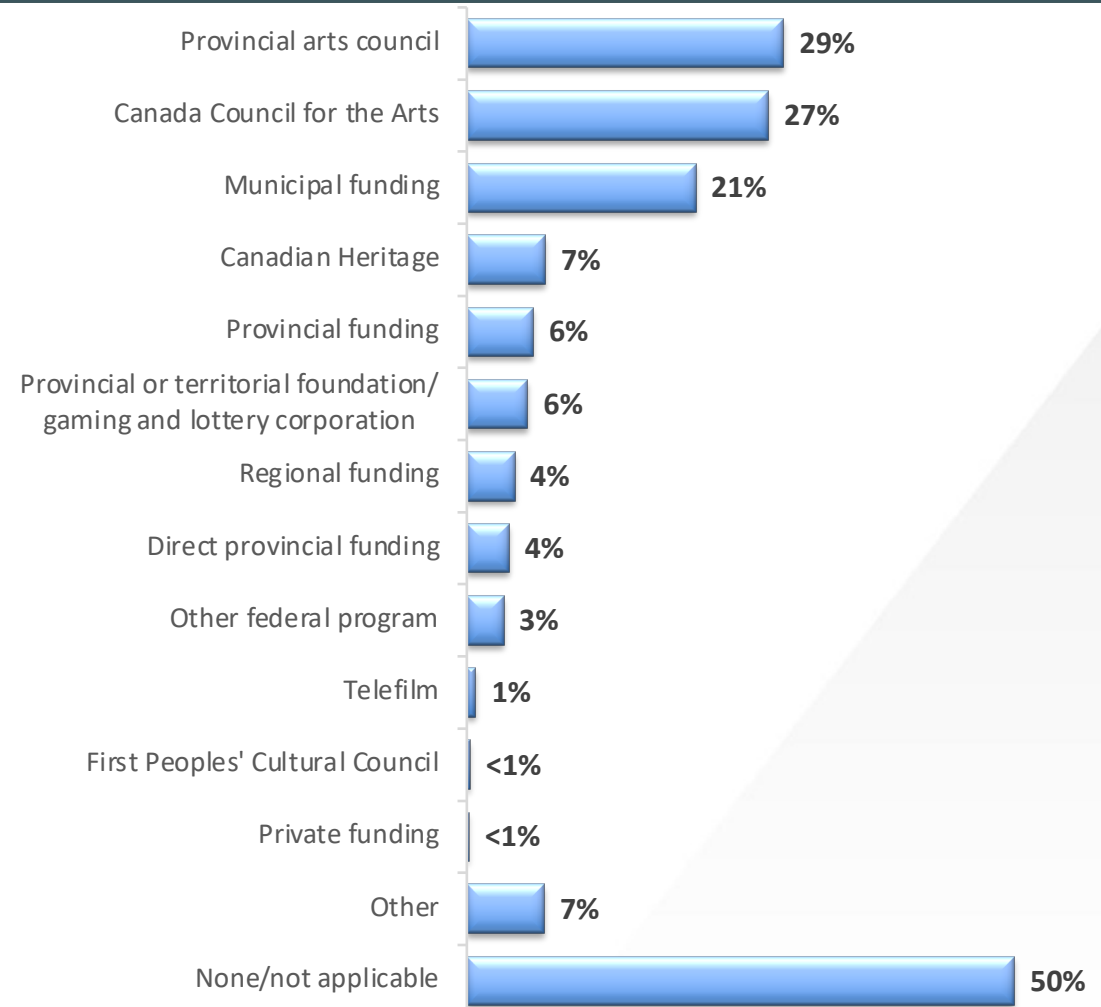




# Funder

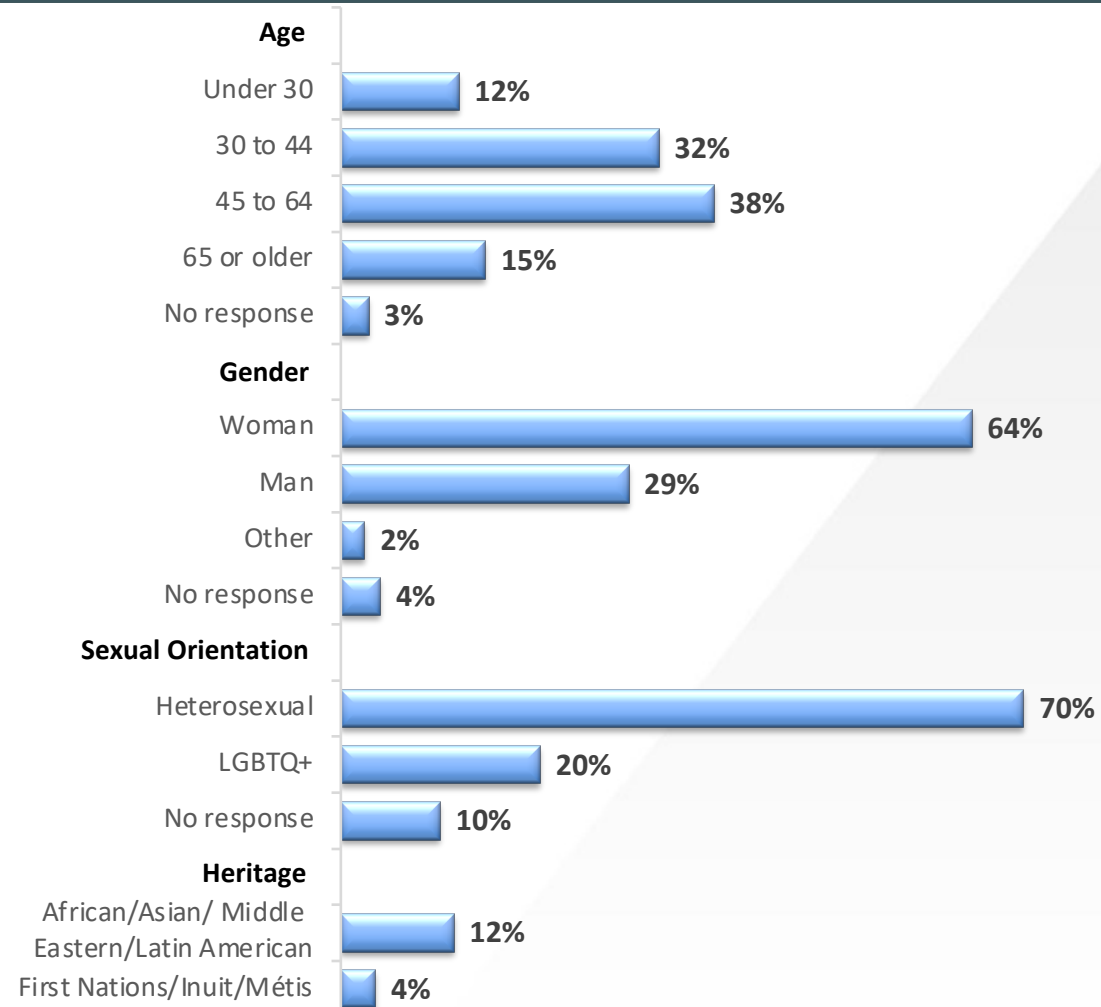
Select all the public agencies you have received funding or support from at least once between 2018 and 2020.

- 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.*



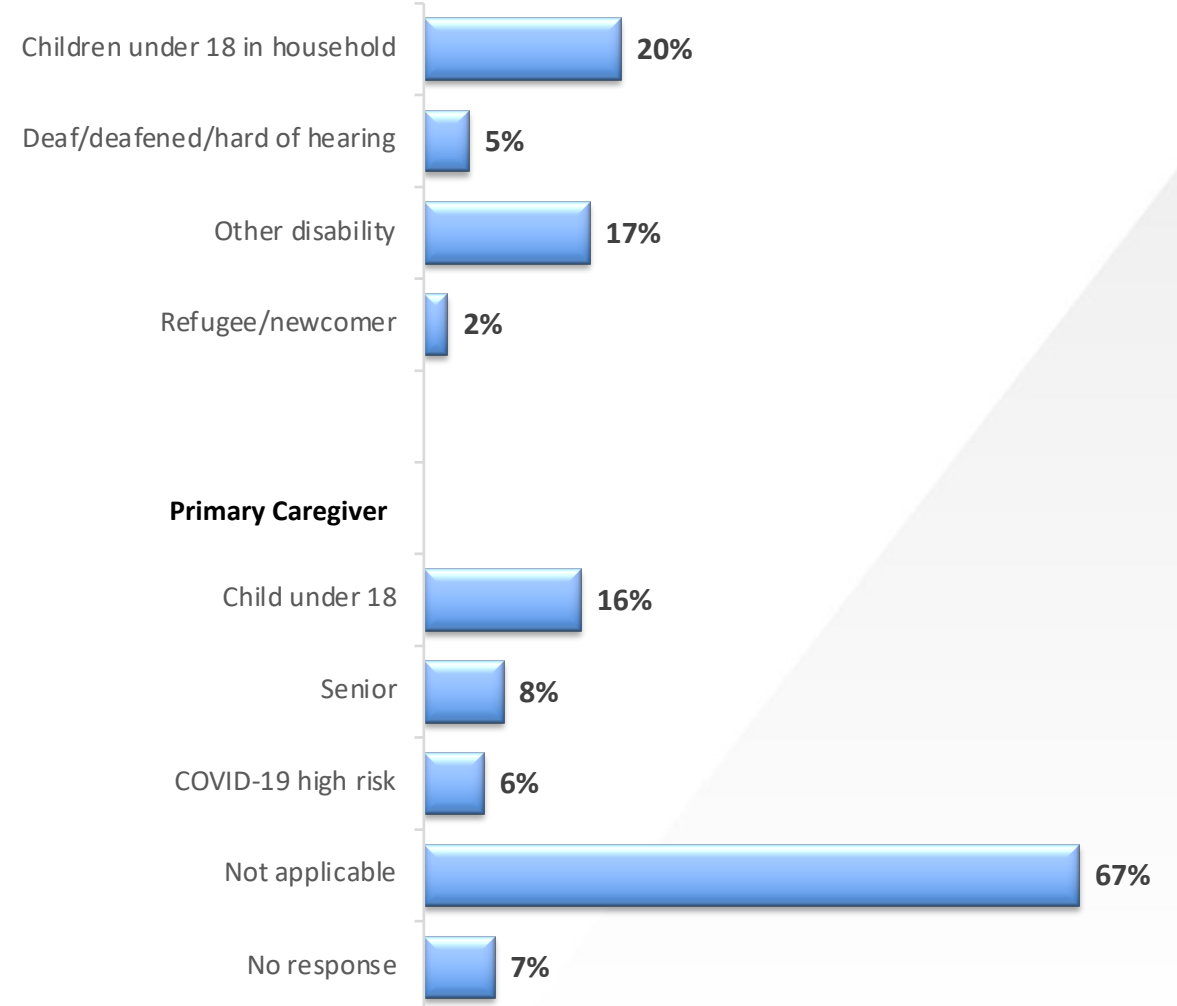
# Individual demographics

- Artists and arts workers 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 have been working in the arts and culture sector and/or engaged in an artistic practice for 22 years.
- The majority of respondents are either established in their arts practice/work or mid-career.

