NATIONAL ARTS AND CULTURE IMPACT SURVEY

ENQUÊTE NATIONALE SUR LES RÉPERCUSSIONS DANS LE SECTEUR CULTUREL

NATIONAL ARTS AND CULTURE IMPACT SURVEY:
ONTARIO ORGANIZATIONS 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 organizations from November 3 to 23, 2020.
- In total, 324 organizations 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 organizations 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 organization.

Impacts of COVID-19

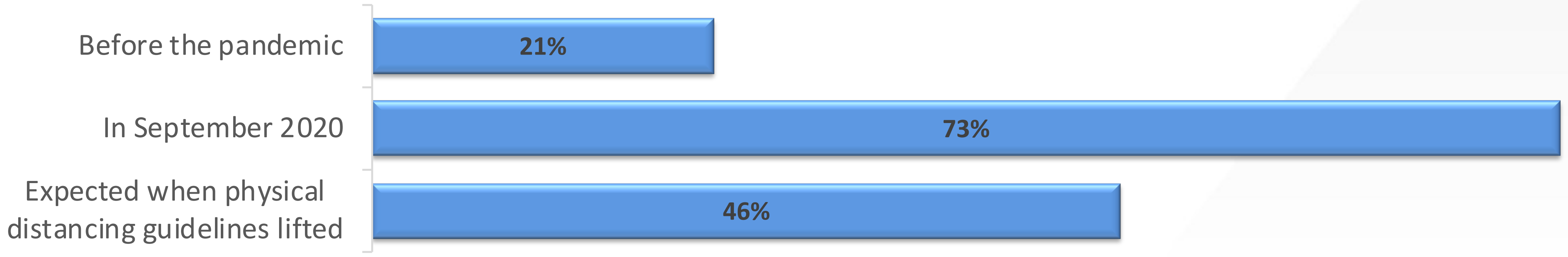
Impact of COVID-19 on remote work

What percentage of your team (operational staff and contractors) work remotely (at least 50% of time)…

- The proportion of staff working from home during COVID-19 (September 2020) is over triple what it was before the pandemic.
- When physical distancing guidelines are lifted, it appears there will be a change, as organizations estimate about 46% of their workforce will be working from home (compared to 21% pre-pandemic).

KEY INSIGHTS

- Not surprisingly, organizations not operating a venue or facility report a greater proportion of their team working remotely over all three time periods compared to those operating a venue or facility.



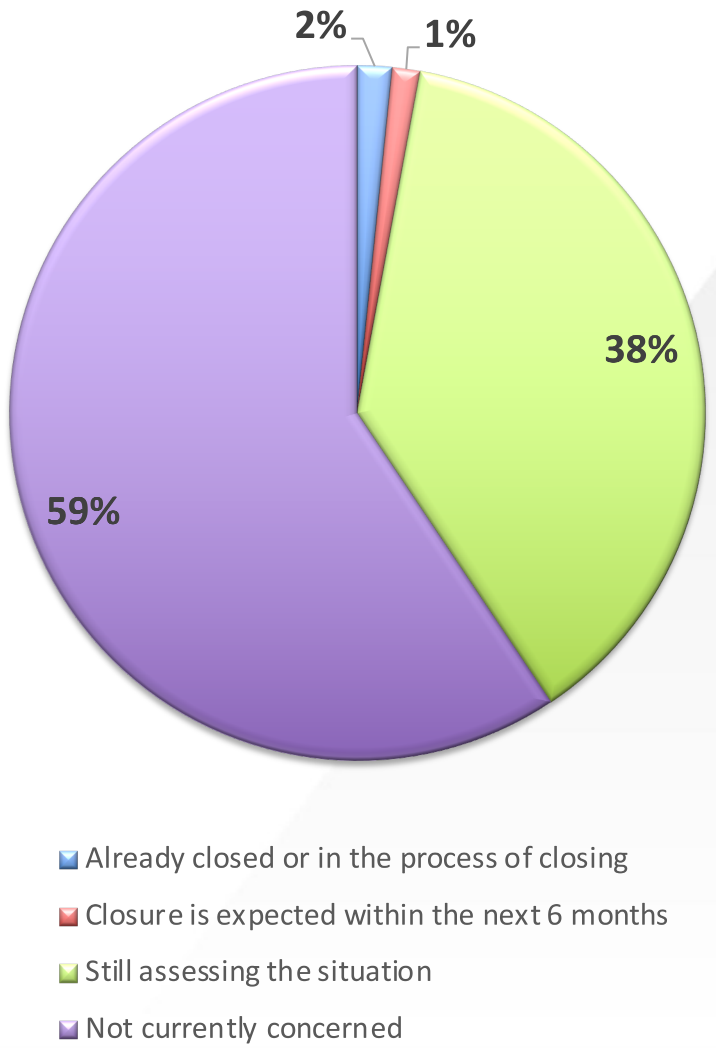
Impact of COVID-19 on operations

Is your organization under serious threat of permanent closure/ceasing operations as a result of COVID-19?

- Just 2% of organizations in Ontario say they are already permanently closed or in the process of closing due to COVID-19, while another 1% say it is imminent in the next six months. Of course, those organizations that have already permanently closed may be under-represented given that no one may be available to complete the survey on behalf of an organization that is no longer operating.

KEY INSIGHTS

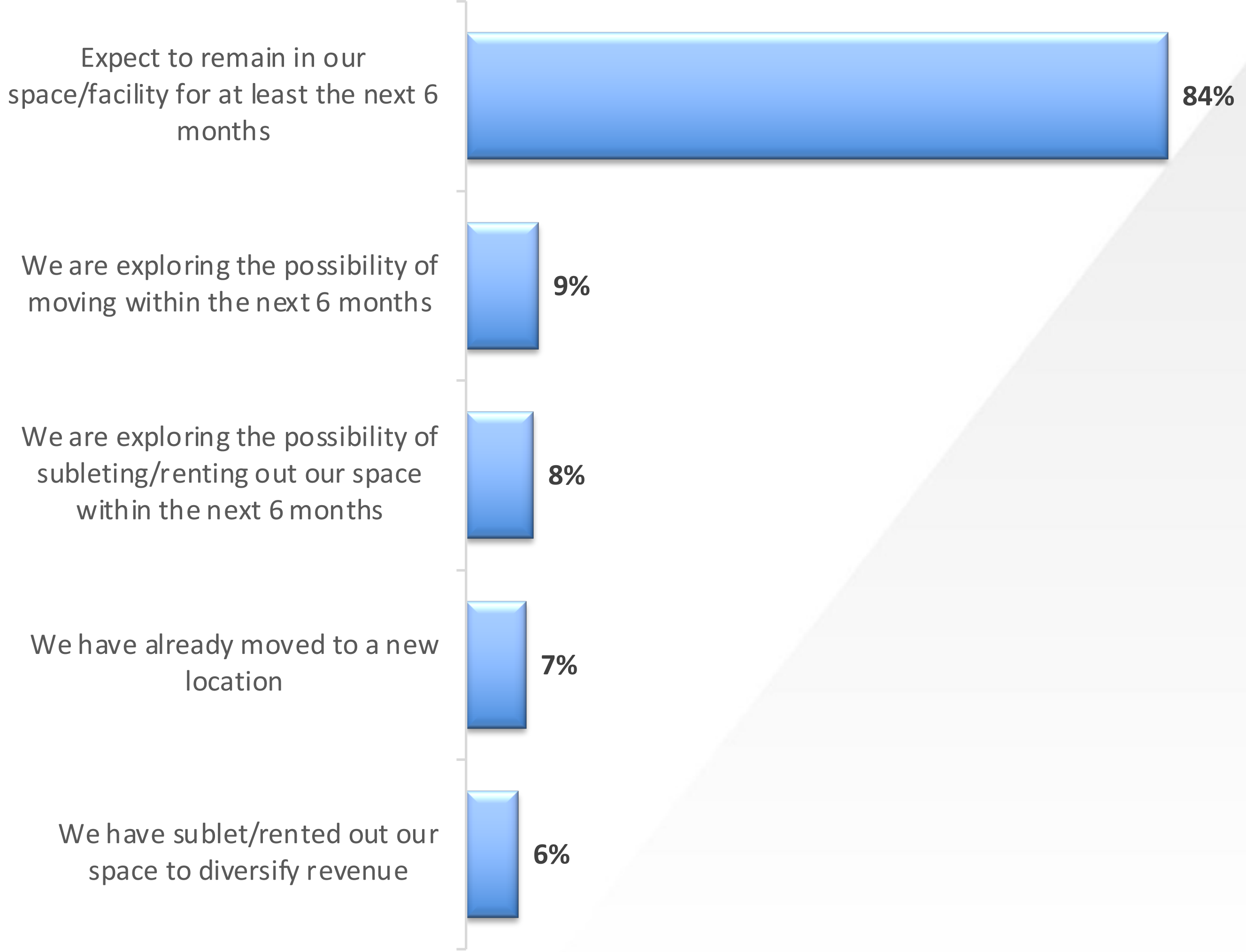
- Although not of statistical significance, organizations that rent (67%), lease (60%), or own (56%) space tend to be more likely to suggest they are not concerned about closing compared to organizations without a space (44%).



Impact of COVID-19 on space

Select all statements that apply to your organization as a result of COVID-19.

- The vast majority of organizations *expect to remain in their space/facility for at least the next six months*, although nearly 1 in 10 are *exploring the possibility of moving*.



Note: Organizations could give more than one answer; therefore, % will sum to more than 100%.

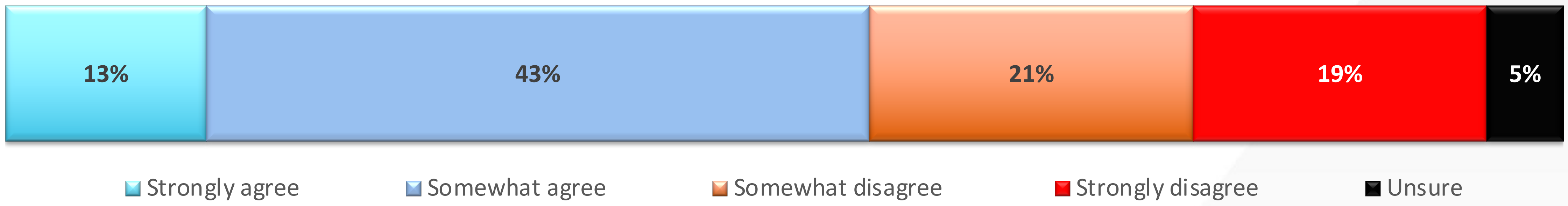
Preparedness for second wave

Do you agree or disagree that your organization is financially prepared for a second wave of COVID-19?

- The proportion of organizations that agree that they are prepared for the second wave of COVID-19 outnumbers those that disagree by about 15%. However, given that just 3% have closed or expect to close in the next six months, the 19% that strongly disagree they are prepared for a second wave does seem to be in opposition.

KEY INSIGHTS

- There were no key differences between groups in terms of being financially prepared for a second wave.



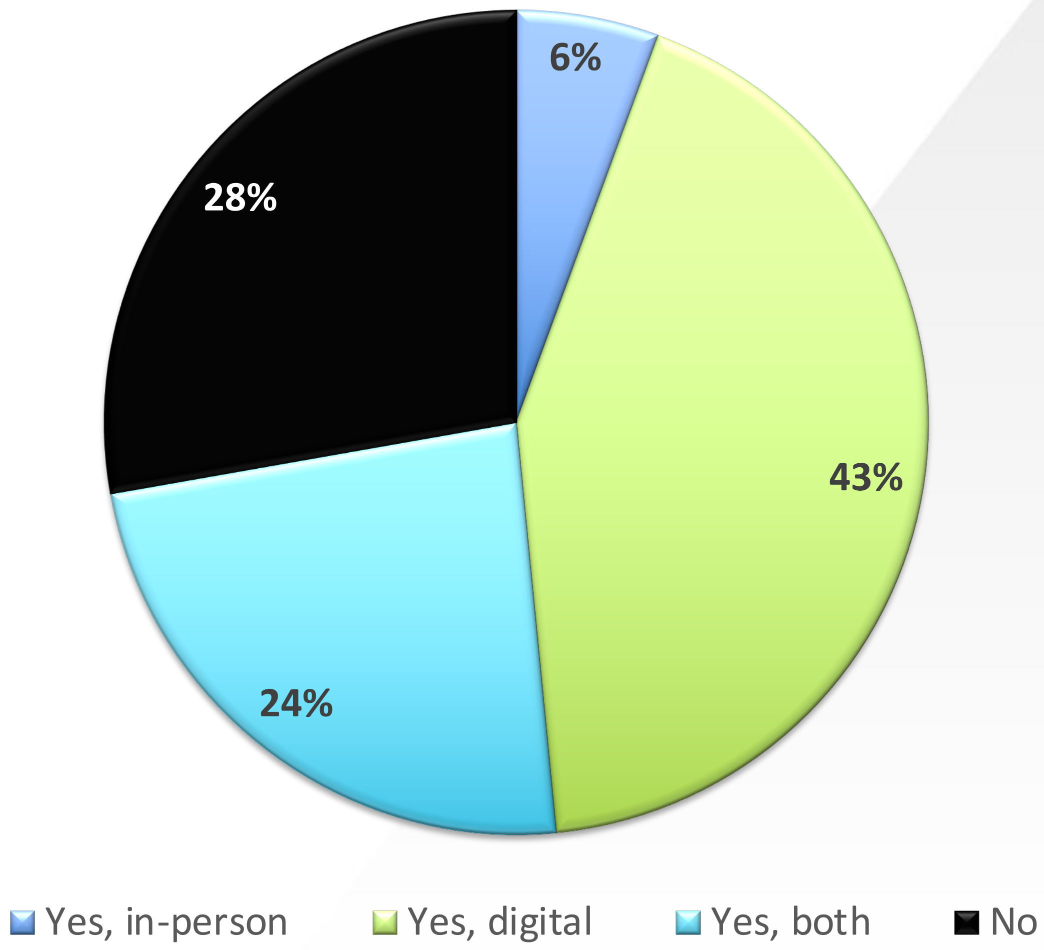
In-person or digital programming

Have you produced or presented any in-person or digital programming between August and October 2020?

- Between August and October 2020, 72% of organizations have done some type of programming, with 67% having done digital and 30% having done in-person (which includes 24% who have done both).

KEY INSIGHTS

- Although falling just outside statistical significance, organizations that operate a venue or facility (39%) are about twice as likely to have produced or presented in-person programming than those that do not (18%).



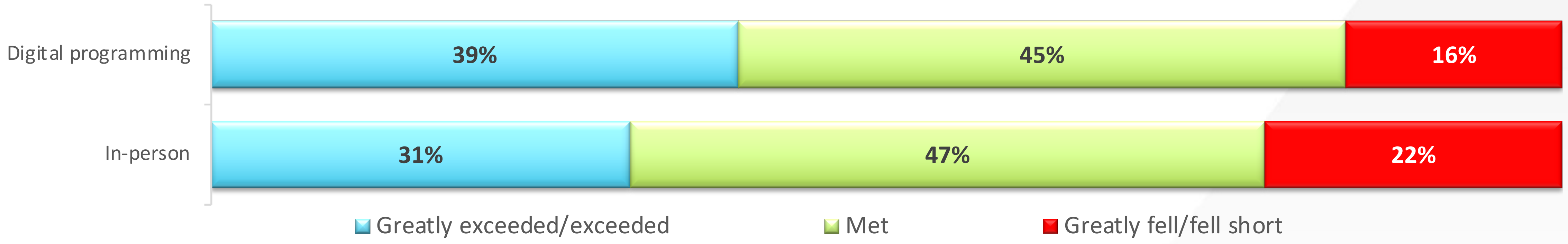
Experiences with in-person and digital programming

As a whole, to what degree did your in-person/digital programming meet your expectations?

- For those organizations that conducted in-person or digital programming between August and October 2020, results for in-person and digital programming were fairly similar, with around one-third saying the programming exceeded expectations compared to around one-fifth who say it fell short.

KEY INSIGHTS

- There were no key differences between groups in terms of in-person or digital programming meeting expectations.

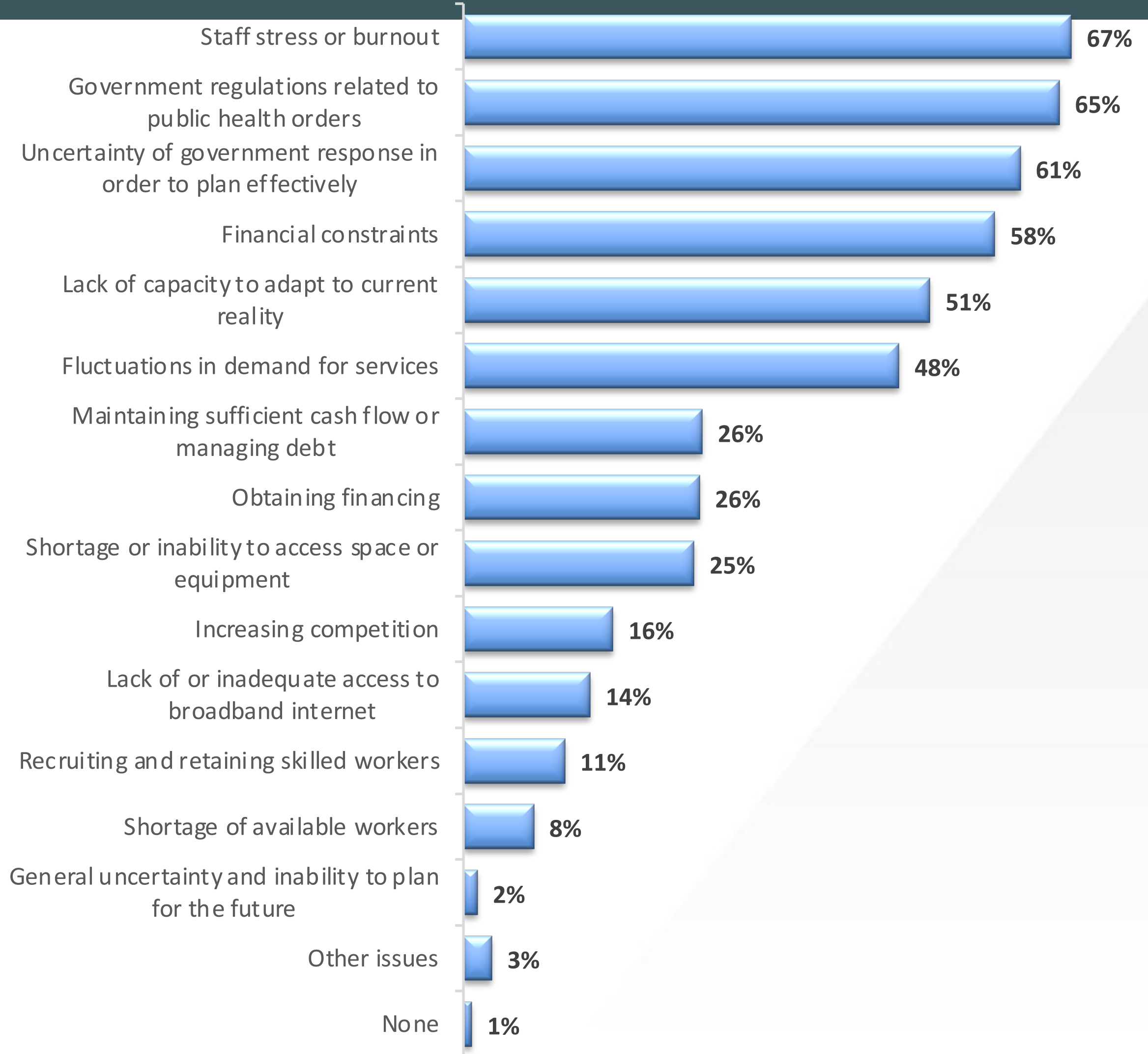


BASE: Those who conducted in-person or digital programming between August and October 2020.

Obstacles faced in the last three months

Over the last three months, which of the following are obstacles your organization has faced?

- Almost all organizations say they have faced at least some barriers over the past three months, with the most common being *staff stress or burnout*.
- Barriers related to government aspects were also commonly mentioned, such as *regulations related to public health orders* and *uncertainty of government response*, followed by *financial constraints*.



Note: Organizations could give more than one answer; therefore, % will sum to more than 100%.

Expectations over next three months

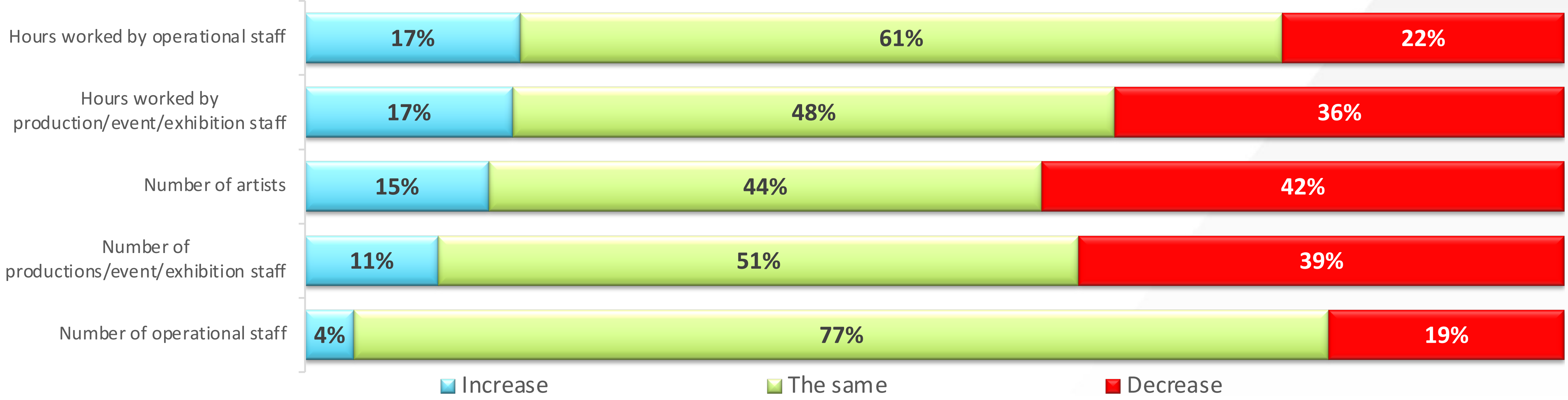
Changes in staffing over the next three months

Over the next 3 months, how do you expect your operational staff to change, compared to the last 3 months?
How do you expect your production, event, exhibition, or artist contracts to change over the next 3 months, compared to the last?

- Over the next three months, organizations generally expect all areas to stay the same compared to the last three months, however, they are more likely to decreases rather than increases.
- The biggest impacts seem to be for the *number of staff for productions, events, and exhibitions* (39% decrease versus 11% increase) and *number of artists* (42% decrease versus 15% increase).

KEY INSIGHTS

- Results showed no key differences among groups for changes in staffing over the next three months.



BASE: Those who conducted in-person or digital programming between August and October 2020.

Government supports

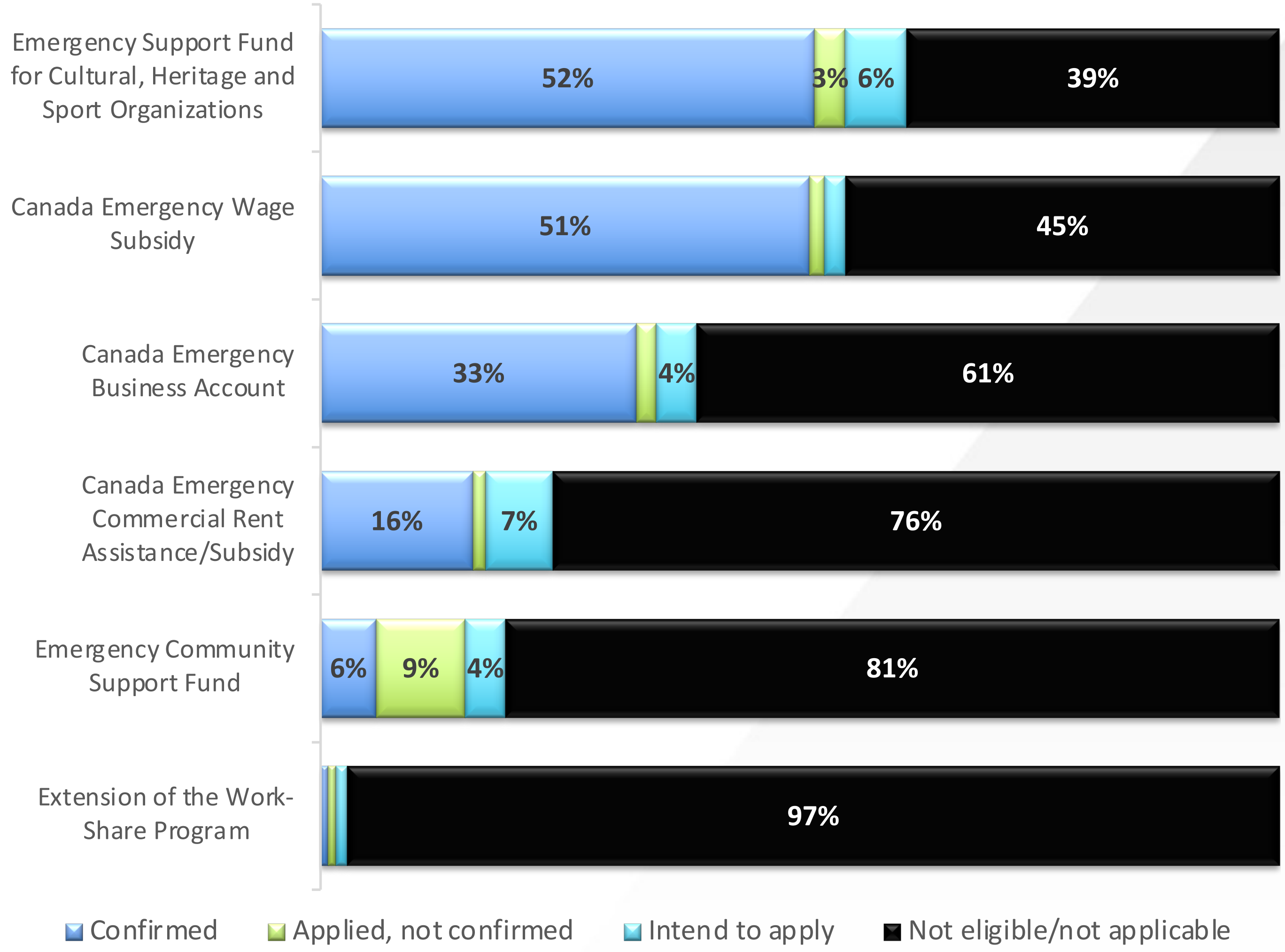
Accessing government supports

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

- When organizations are eligible for a program, the vast majority use it. For example, 61% of organizations are eligible for the *Emergency Support Fund for Cultural, Heritage and Sport Organizations.* Of those eligible, 90% have applied (55% of organizations).

KEY INSIGHTS

- Of note, organizations that operate a venue (63%) are more likely than those that do not (45%) to have applied (confirmed or not confirmed) for the *Canada Emergency Wage Subsidy*.



Note: Answers of “not sure” have been removed from calculations.

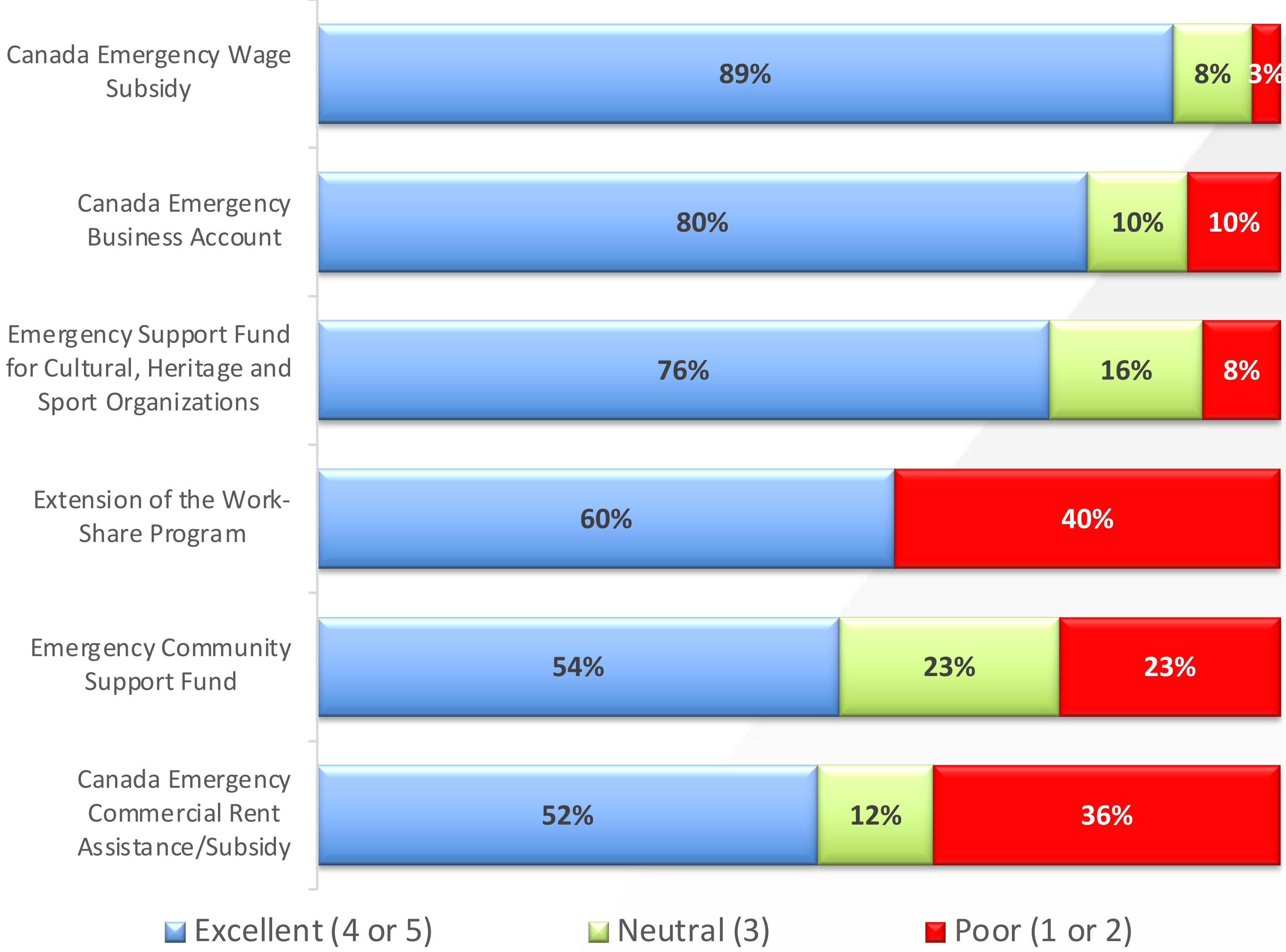
Perceptions of government supports

Please indicate your rating of the following government supports:

- Organizations are most positive about the *Canada Emergency Wage Subsidy, Canada Emergency Business Account*, and *Emergency Support Fund for Cultural, Heritage and Sport Organizations*.

KEY INSIGHTS

- For perceptions of government supports, there were no key differences between groups.



Note: Answers of "not applicable" and "don't know" been removed from calculations.

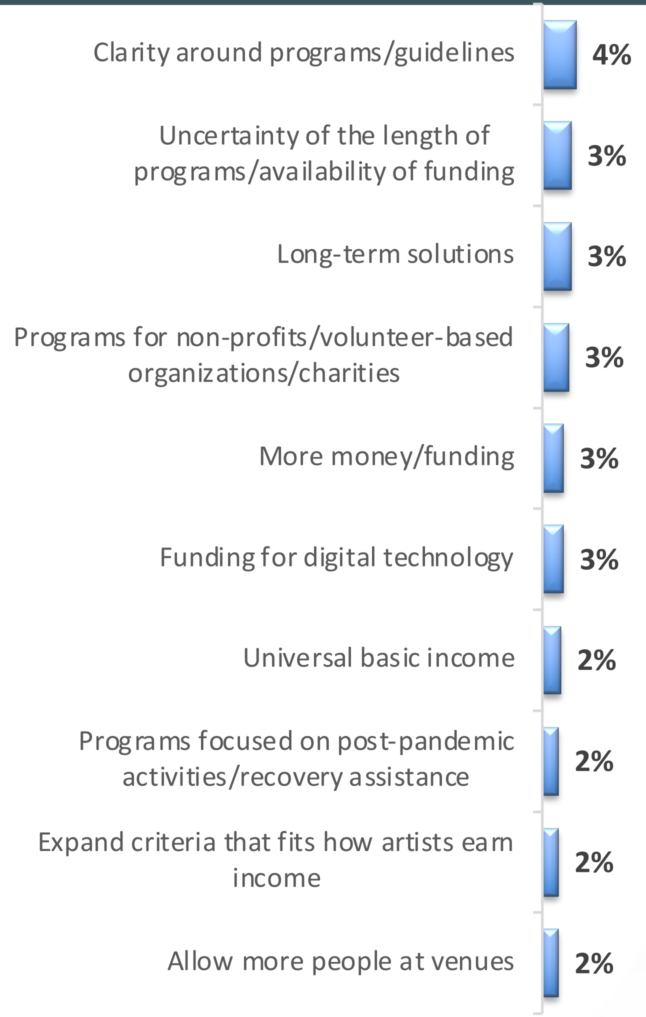
Comments on programs

- **Canada Emergency Wage Subsidy.** About 21% provided comments about this program, most commonly saying *it is a great program* (5%), the program *was a lifeline/allowed them to continue to operate* (4%), they are *not eligible because staff are contractors* (4%), and *the application process was complicated* (4%).
- **Emergency Support Fund for Cultural, Heritage and Sport Organizations**. About 18% provided comments about this program, most commonly saying they were *not eligible* (4%), the *eligibility requirements were unfair* (3%), it was a *great program* (3%), and *the process was smooth* (3%).
- **Canada Emergency Business Account.** Only 11% provided comments about this program, most commonly saying *it is a great program* (2%), *there was not enough information about program changes* (2%), they were *not eligible because staff are contractors* (2%), they were *not eligible for other reasons* (2%), or they would like *more of the loan to be forgivable* (2%).
- **Canada Emergency Commercial Rent Assistance/Subsidy**. Only 9% provided comments about this program, most commonly saying it was *hard to deal with other organizations (e.g., landlords)* (4%) or they were *not eligible* (2%).
- **Emergency Community Support Fund**. Only 4% provided comments about this program, most commonly saying they were *not eligible* (1%).
- **Extension of the Work-Share Program**. No organizations provided a comment 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, about half of organizations provided a comment; however, no single issue seemed dominant, with several being mentioned by 2% to 4% of organizations.

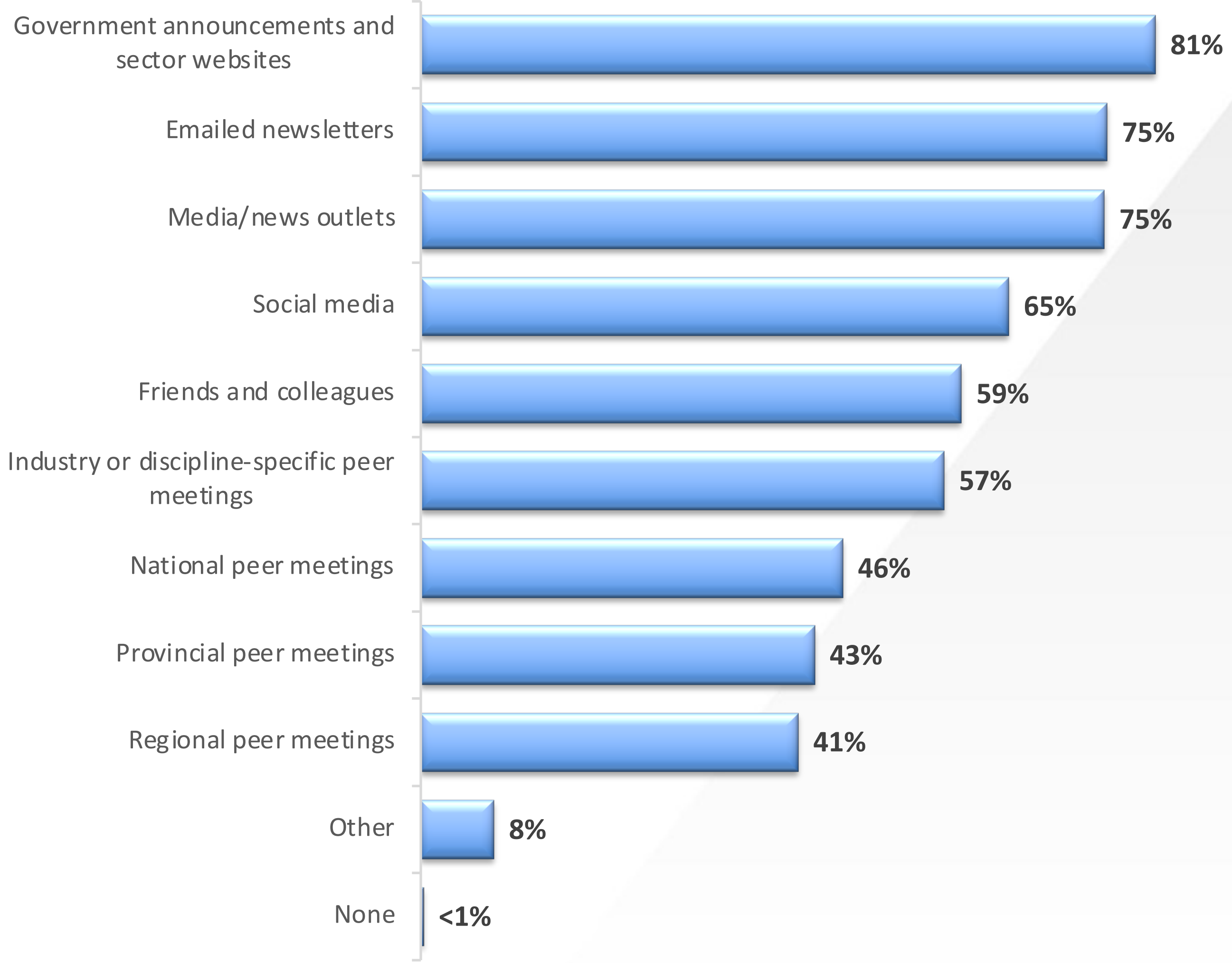


Note: Organizations could give more than one answer.

Staying informed

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

- Almost all organizations are staying informed about announcements and updates, most often through *government announcements and sector websites*, *emailed newsletters*, and *media/news*.



Note: Organizations could give more than one answer; therefore, % will sum to more than 100%.

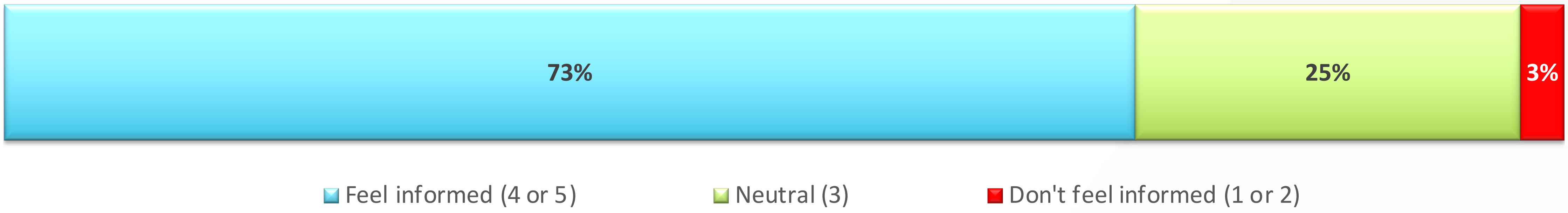
Feel informed about sector and government updates

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

- Most organizations report feeling informed about sector and government updates, with only 3% indicating they don't feel informed.
- There is a strong relationship between feeling informed and the number of sources organizations report using (on the previous slide). For example, those that rate themselves a 5 out of 5 (very informed) report using 6 sources on average, whereas those who rate themselves a 1 out of 5 use 2.8 sources on average.

KEY INSIGHTS

- There were no key differences among groups in terms of feeling informed about sector and government updates.

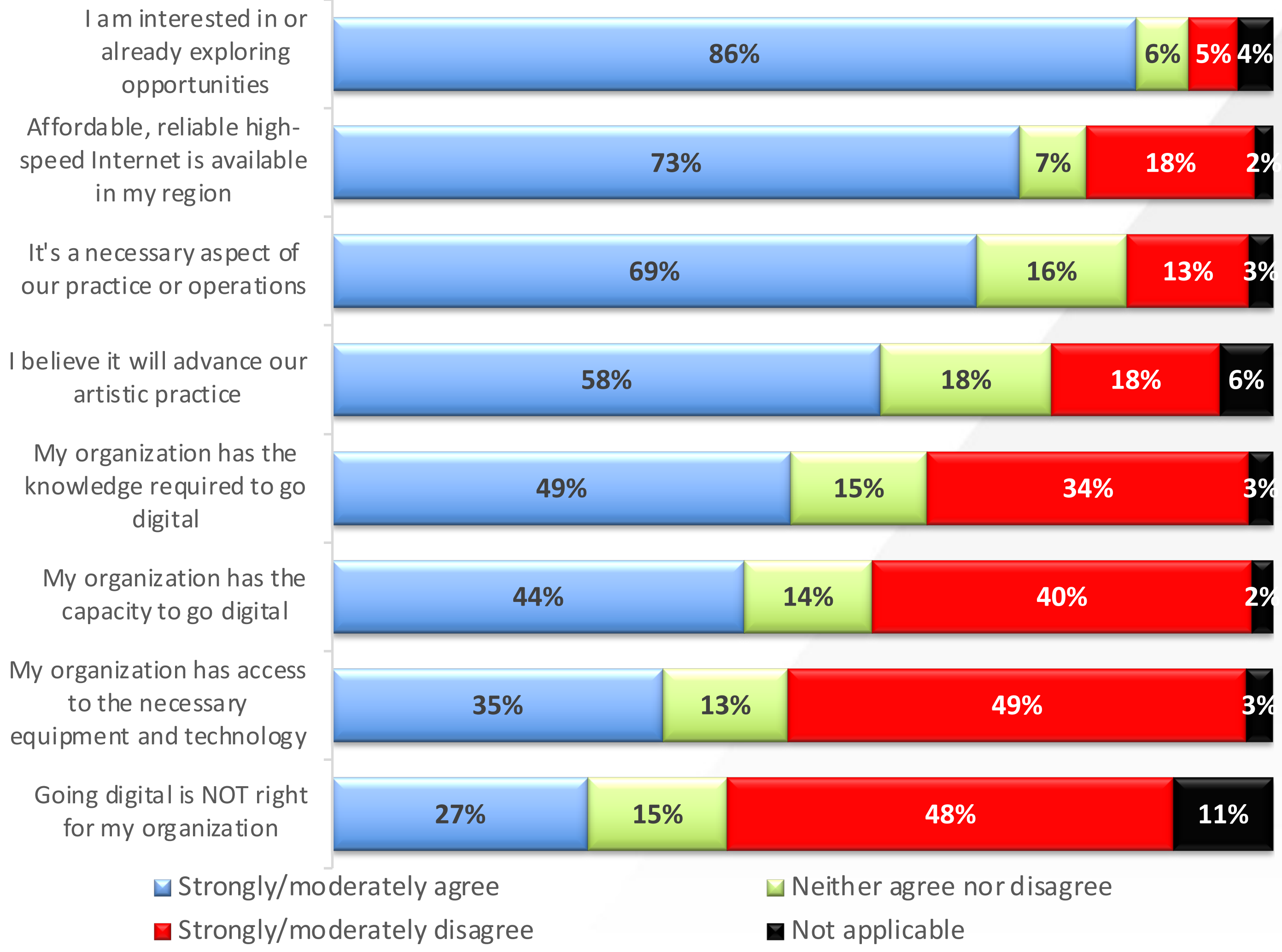


Pivoting to digital programming

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, organizations in Ontario are most likely to agree that they are *interested in or already exploring opportunities* and *affordable, reliable high-speed Internet is available in my region*.
- Although interest and knowledge may be there, access appears to be an issue, as organizations are least likely to agree that *they have the necessary equipment and technology*.



KEY INSIGHTS

- Results showed no key differences between groups for thoughts about pivoting to digital programming and practices.

Mental health and optimism

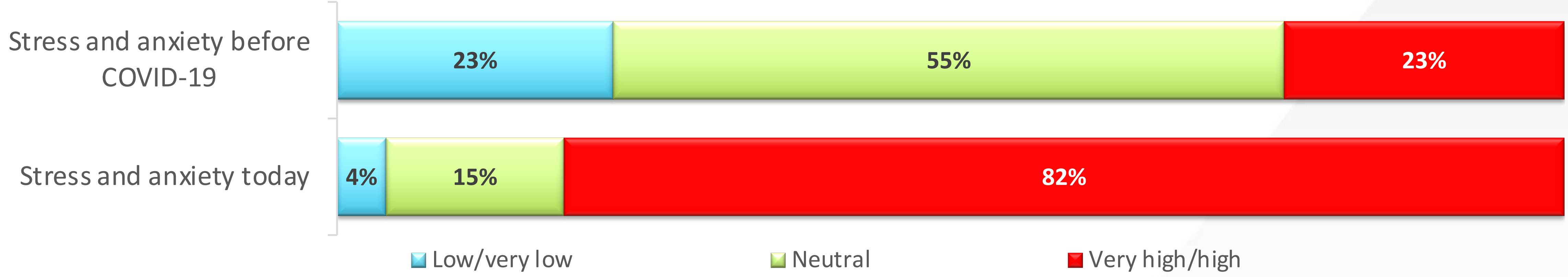
Stress and anxiety pre- and during COVID-19

How would you describe your…

- Over three times as many organizations report *very high* or *high* levels of stress and anxiety today as compared to before COVID-19. Even more telling is that just 5% reported *very high* levels pre-COVID-19 compared to 31% today.

KEY INSIGHTS

- For stress and anxiety levels, there were no key differences between groups.



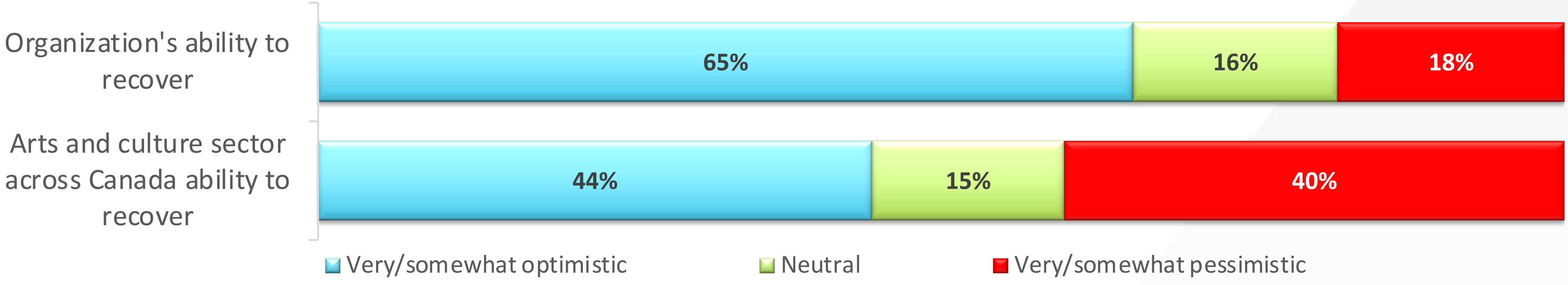
Optimism for recovery

As of today, how optimistic are you about…

- Organizations are much more optimistic about their ability to recover from the impacts of COVID-19 than the industry as a whole. In fact, more than twice as many are *very or somewhat pessimistic* about the arts and culture sector across Canada compared to their organization's ability to recover.

KEY INSIGHTS

- Results showed little difference between groups in terms of optimism about the ability of their own organization's or the arts and culture sector across Canada to recover.

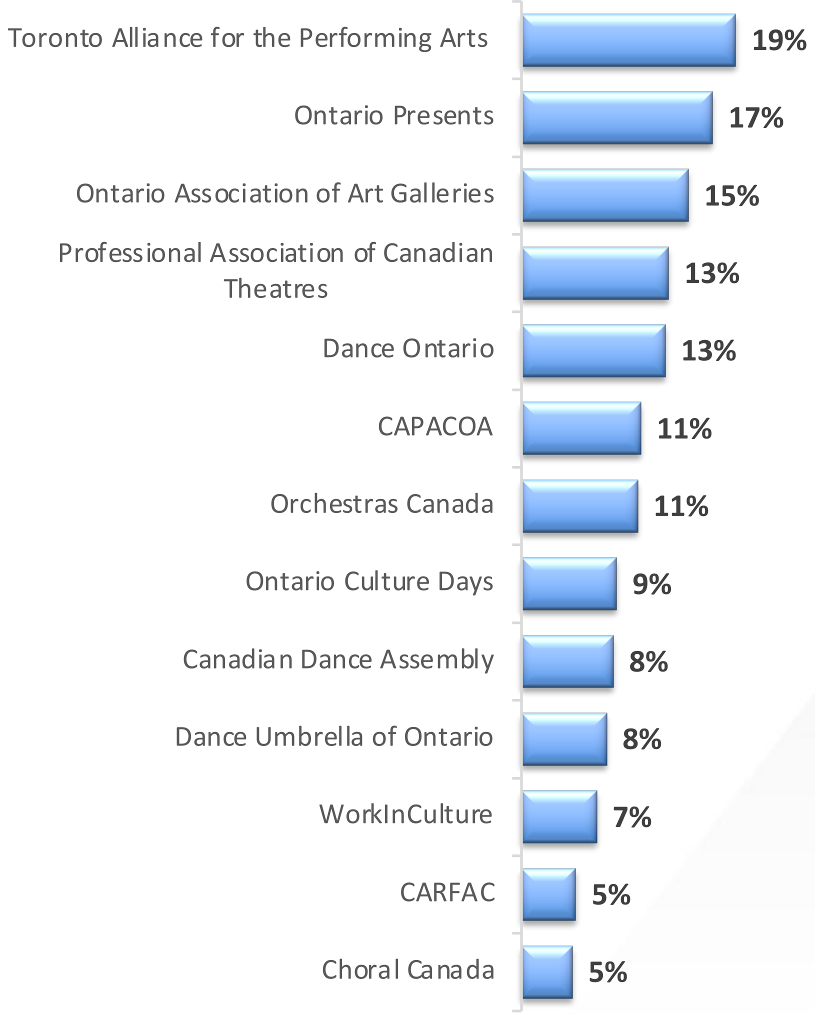


Profile of organizations

Arts organization affiliation

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

- Organizations 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.

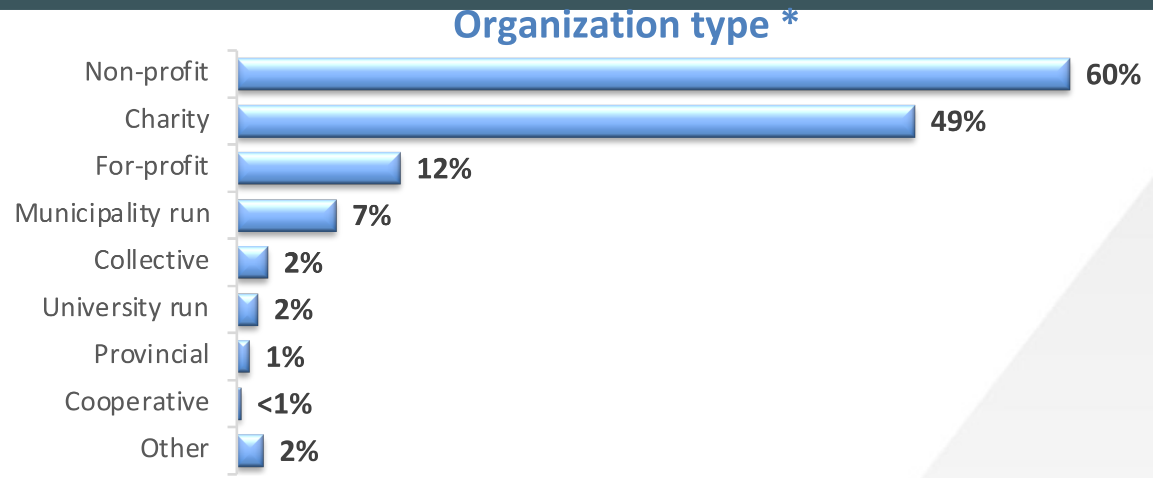


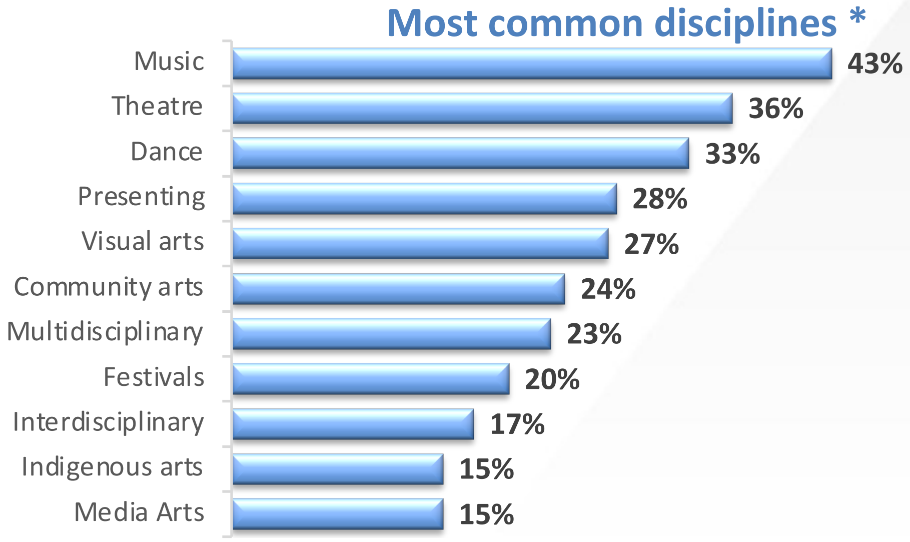
Note: Organizations could give more than one answer; therefore, % will sum to more than 100%.

Organization information

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

- Graphs on this page show the types of organizations that completed the survey.
- For disciplines, organizations could select from 17 different disciplines and those selected by at least 15% of respondents are shown.



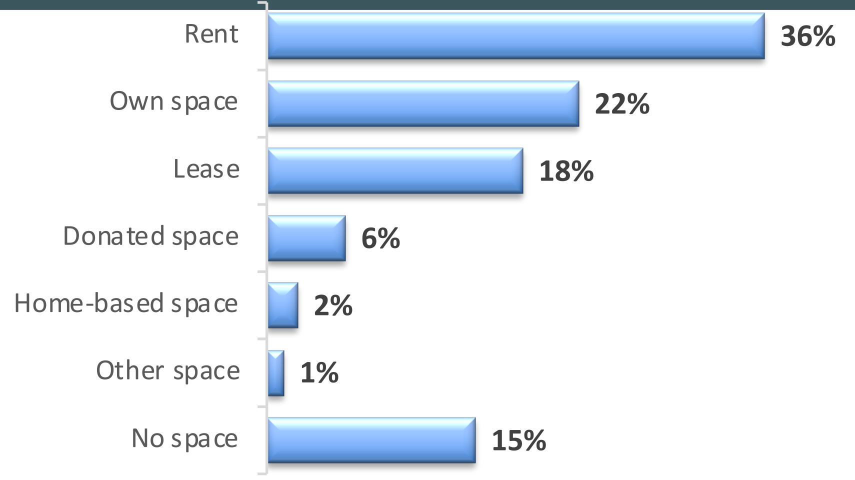


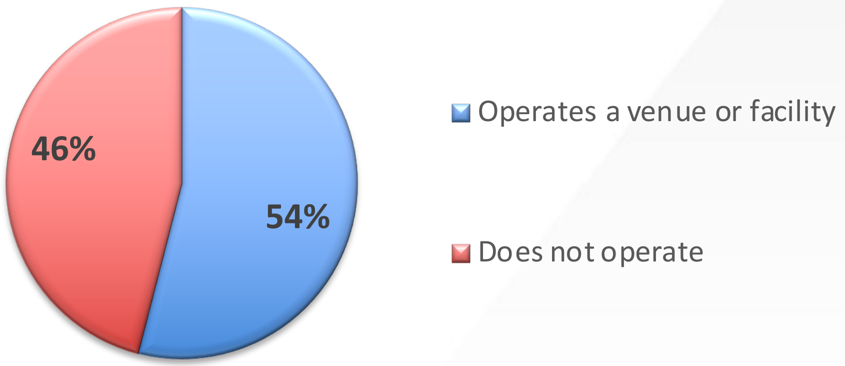
* Note: Organizations could give more than one answer for organization type and discipline; therefore, % will sum to more than 100%.

Infrastructure

Does your organization have an office, space, or facility?
Does your organization operate a venue or facility which is used for programming or activities?

- The vast majority of organizations have some type of space, most commonly renting their space.
- Organizations are split almost 50/50 in terms of those who operate or do not operate space.

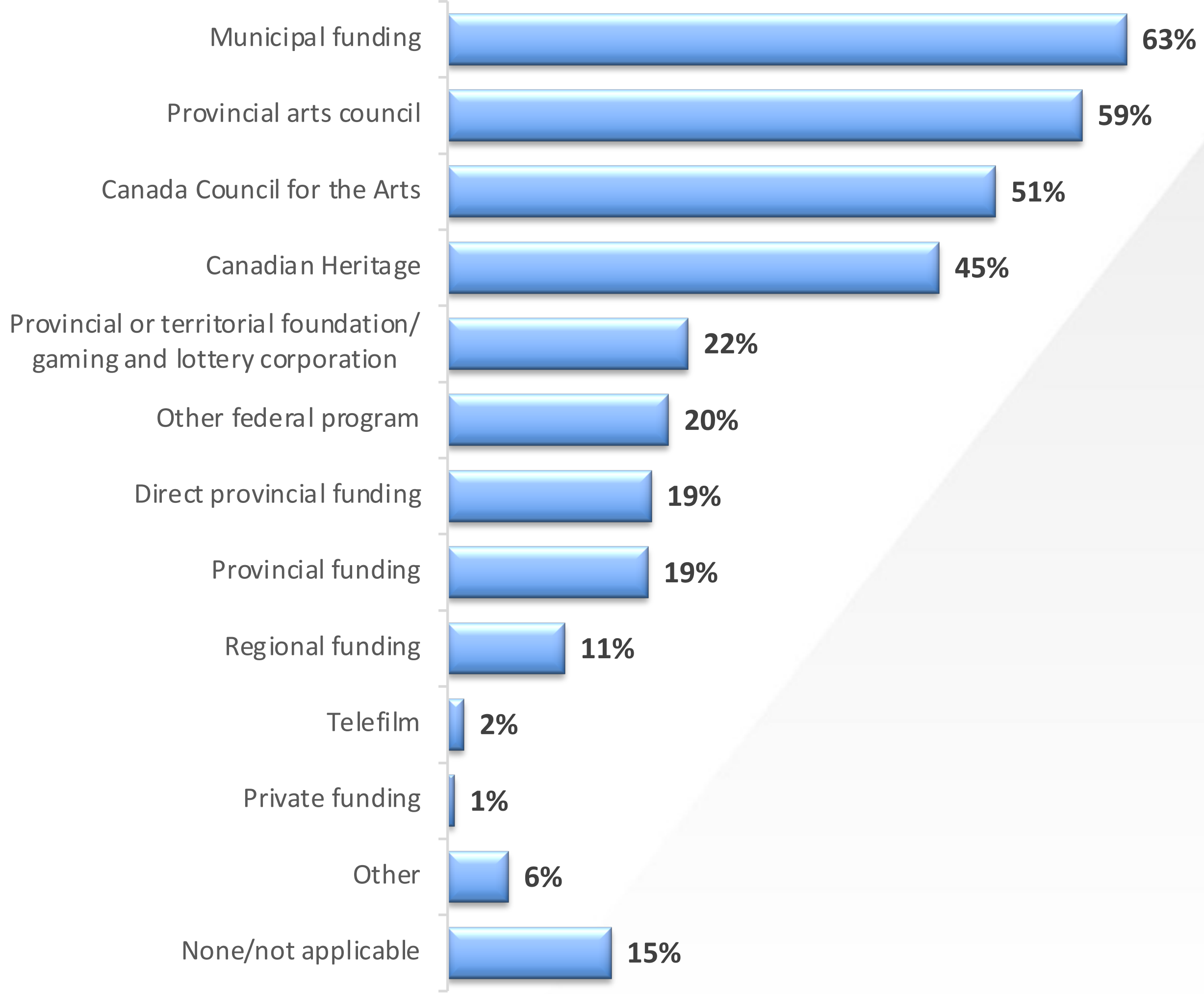




Funder

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

- Organizations' funding bodies can be seen on the right. The majority of organizations received funding from the following four sources between 2018 and 2020: *municipal funding, provincial arts councils, Canada Council for the Arts*, and *Canadian Heritage*.



Note: Organizations could give more than one answer; therefore, % will sum to more than 100%.

Working Capital Ratio

If known, please indicate whether your Working Capital Ratio (line 6360 in CADAC) is…

- The vast majority of organizations either *do not use CADAC* or are *unsure of their Working Capital Ratio*.
- For those who use or are aware, the most common ratio is *between 1 and 5*.

KEY INSIGHTS

- Although not a statistical difference, organizations renting (70%) or leasing (75%) space are more likely to use CADAC compared to organizations who own their space (56%) or do not have a space (56%).