NATIONAL ARTS AND CULTURE IMPACT SURVEY

ENQUÊTE NATIONALE SUR LES RÉPERCUSSIONS DANS LE SECTEUR CULTUREL

NATIONAL ARTS AND CULTURE IMPACT SURVEY:
ORGANIZATIONS REPORT

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PRA
Prairie Research Associates

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, 728 organizations 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 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.
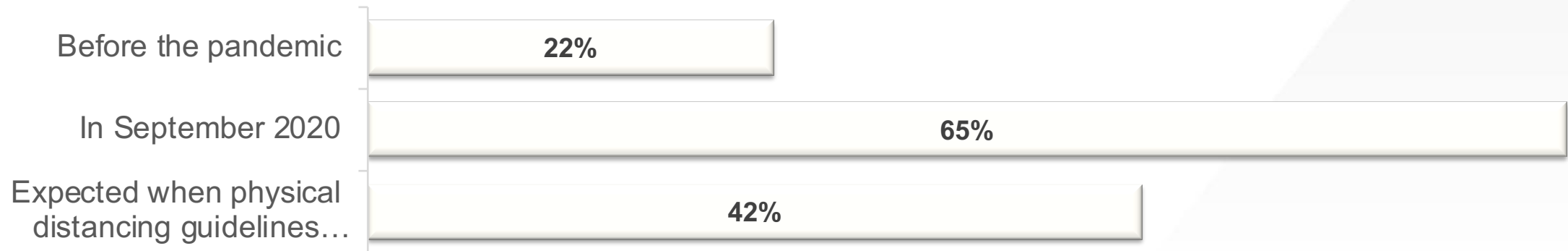
Impacts of COVID-19

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 approximately triple what it was before the pandemic.
- When physical distancing guidelines are lifted, it appears there will be a change, as organizations estimate about 42% of their workforce will be working from home (compared to 22% 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.
- Also of note, organizations in Ontario and Québec reported the highest proportion of their team working remotely in September 2020 compared to organizations elsewhere.

Before the pandemic	22%
In September 2020	65%
Expected when physical distancing guidelines…	42%

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 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
- Organizations that rent (68%), lease (70%), or (to a lesser extent) own (57%) space tend to be more likely to suggest they are not concerned about closing compared to organizations without a space (41%).

2% 1%

34%

63%
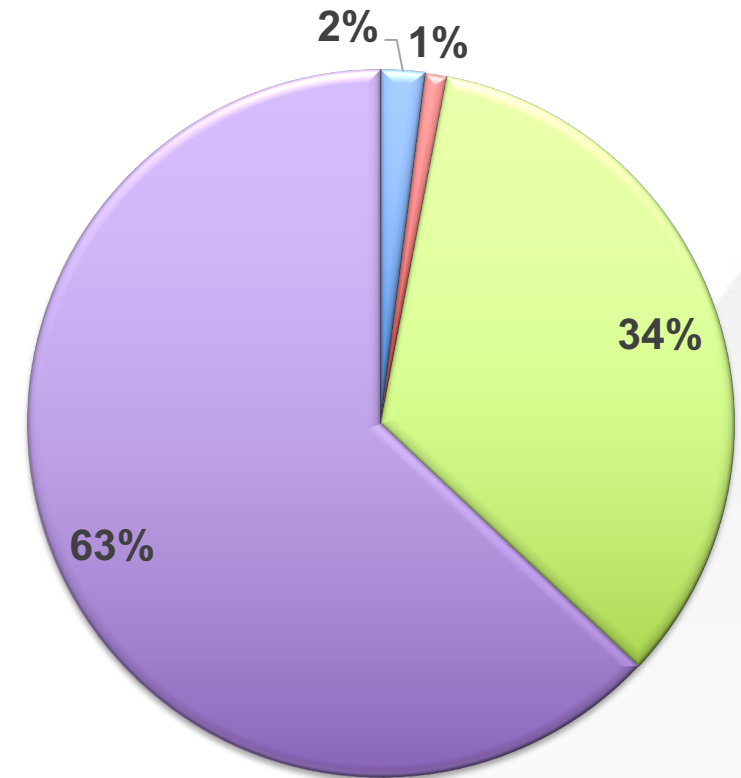
- Already closed or in the process of closing
- Closure is expected within the next 6 months
- Still assessing the situation
- Not currently concerned

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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 about 1 in 10 are *exploring the possibility of moving*.

Statement	Percentage
Expect to remain in our space/facility for at least the next 6 months	86%
We are exploring the possibility of moving within the next 6 months	9%
We have already moved to a new location	7%
We are exploring the possibility of subleting/renting out our space within the next 6 months	7%
We have sublet/rented out our space to diversify revenue	5%

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

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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 1.5:1. However, given that just 1% expect to close in the next six months, the 16% 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.

12%	45%	21%	16%	7%

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Unsure

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 37% having done in-person and 62% having done digital (which includes 27% who have done both).

KEY INSIGHTS

- Organizations in Alberta, Saskatchewan, and Manitoba are less likely than organizations elsewhere to have produced or presented any programming between August and October 2020.

- Not surprisingly, organizations that operate a venue or facility (45%) are more likely to have produced or presented in-person programming than those that do not (28%).

10%

35%

27%

28%
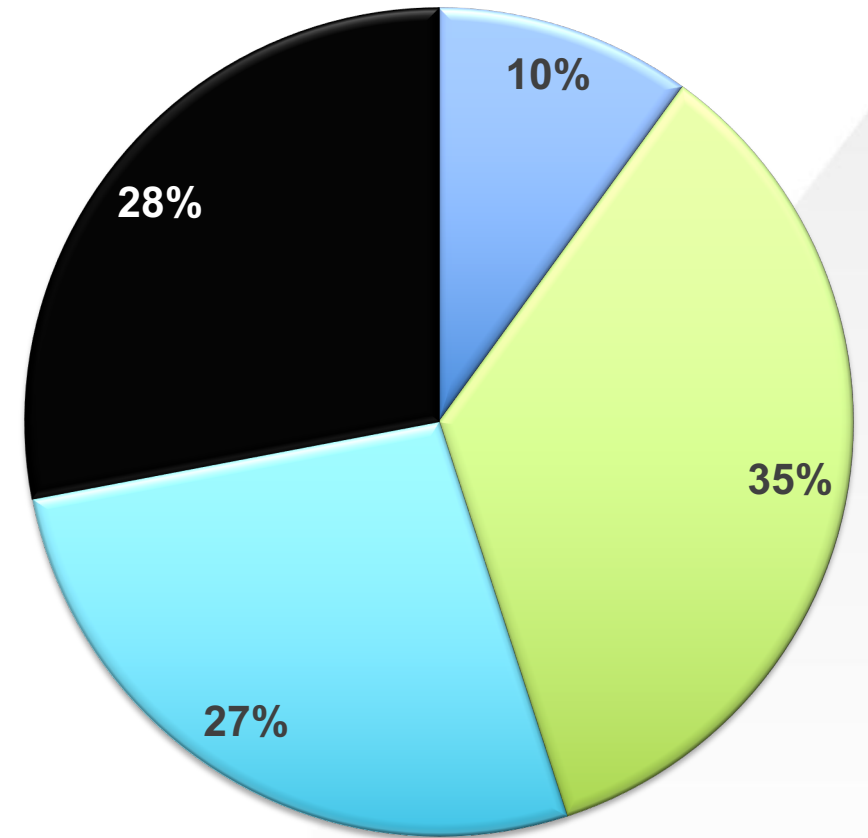
◨ Yes, in-person   ◨ Yes, digital   ◨ Yes, both   ◼ No

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 about one-third saying the programming exceeded expectations compared to about 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.

	Greatly exceeded/exceeded	Met	Greatly fell/fell short
Digital programming	35%	45%	20%
In-person	31%	49%	19%

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

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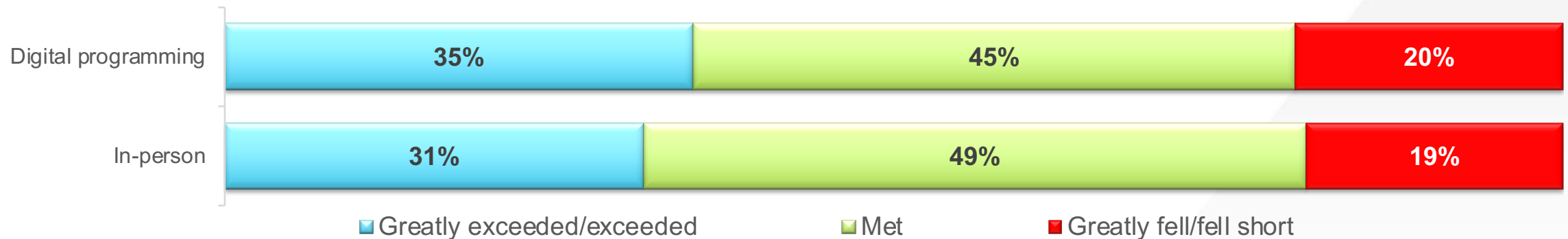
Over the last three months, which of the following are obstacles your organization has faced?

- Almost all organizations say they have faced at least some barriers over the past three months, with the most common being related to government aspects – *regulations related to public health orders* and *uncertainty of government response*.
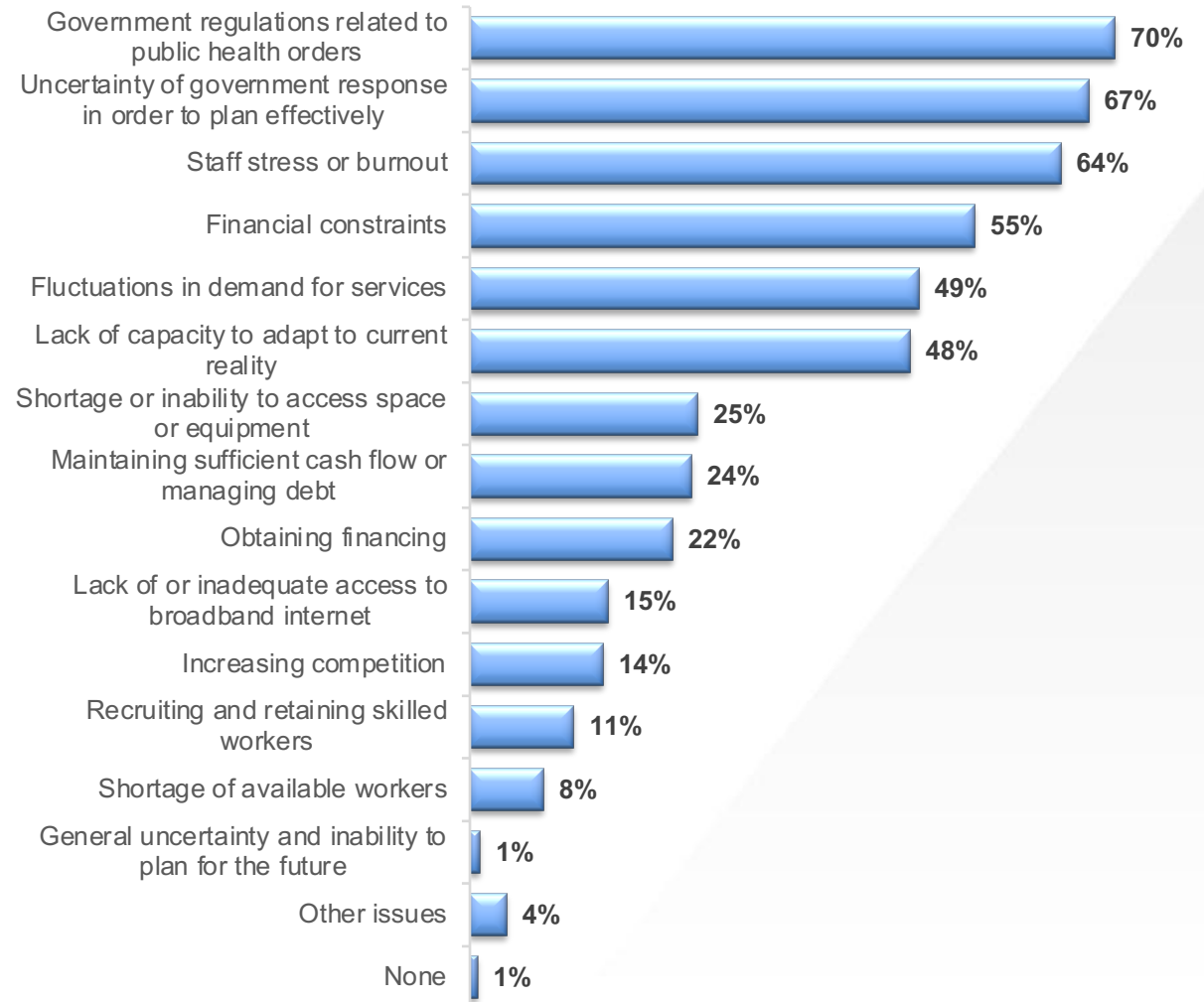- *Staff stress or burnout* was also a common barrier.

KEY INSIGHTS

- Organizations with no space tend to be more likely to mention *obtaining financing* and less likely to mention *government regulations* as obstacles compared to their counterparts.

Obstacle	%
Government regulations related to public health orders	70%
Uncertainty of government response in order to plan effectively	67%
Staff stress or burnout	64%
Financial constraints	55%
Fluctuations in demand for services	49%
Lack of capacity to adapt to current reality	48%
Shortage or inability to access space or equipment	25%
Maintaining sufficient cash flow or managing debt	24%
Obtaining financing	22%
Lack of or inadequate access to broadband internet	15%
Increasing competition	14%
Recruiting and retaining skilled workers	11%
Shortage of available workers	8%
General uncertainty and inability to plan for the future	1%
Other issues	4%
None	1%

10

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

Expectations over next three months

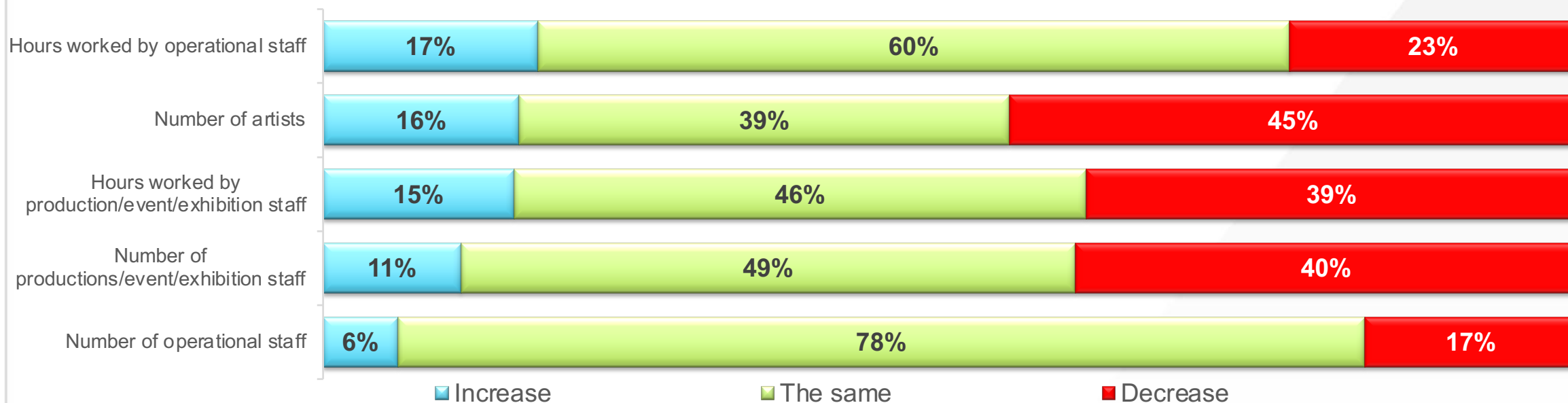# Changes in staffing over the next three months

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 expect a decrease in all areas compared to the last three months, with the biggest impacts seeming to be for *artists* (45% decrease versus 16% increase) and *number of staff for productions, events, and exhibitions* (40% decrease versus 11% increase).

KEY INSIGHTS

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

	Increase	The same	Decrease
Hours worked by operational staff	17%	60%	23%
Number of artists	16%	39%	45%
Hours worked by production/event/exhibition staff	15%	46%	39%
Number of productions/event/exhibition staff	11%	49%	40%
Number of operational staff	6%	78%	17%

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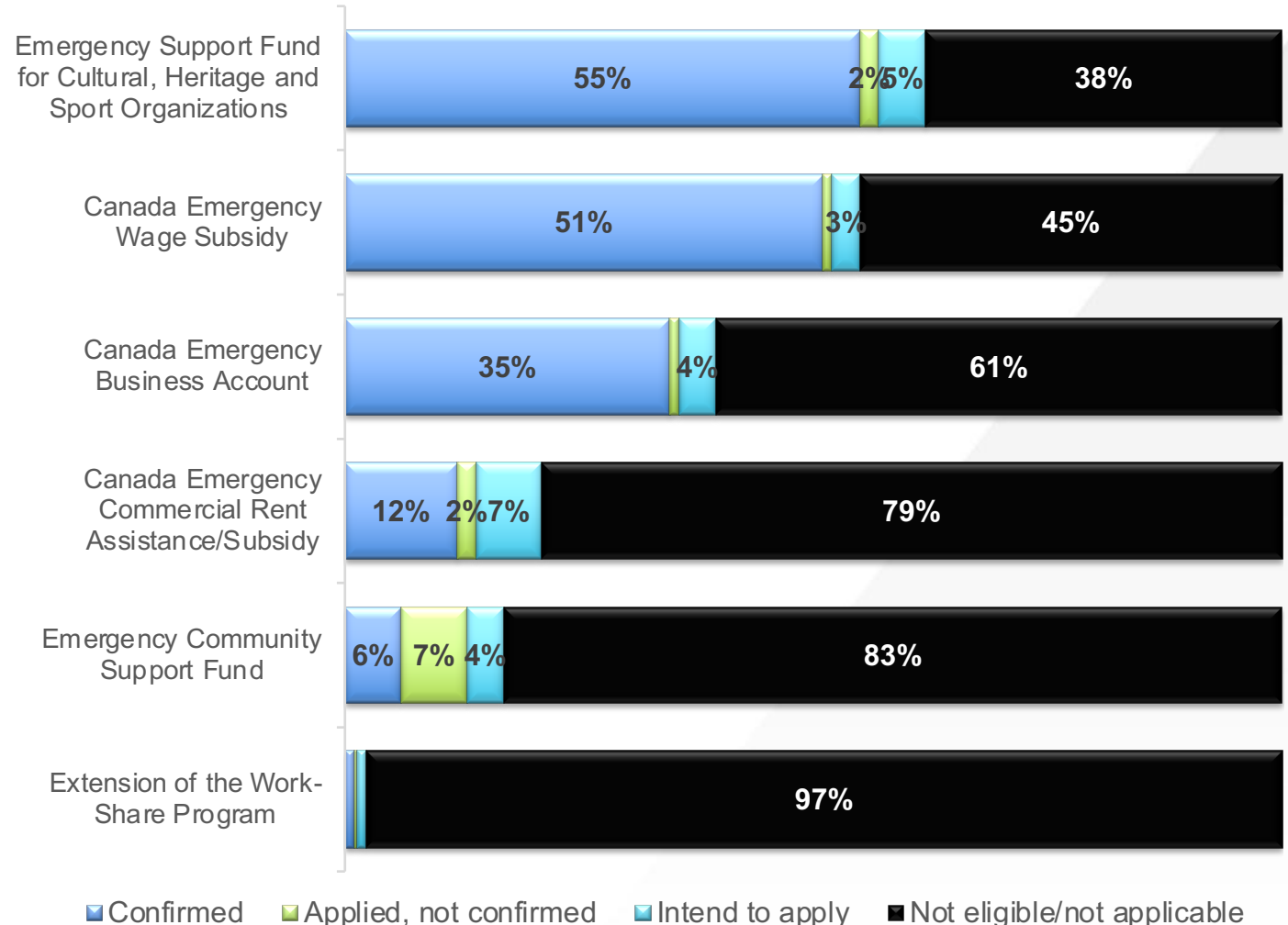
Government supports

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, 62% of organizations are eligible for the *Emergency Support Fund for Cultural, Heritage and Sport Organizations.* Of those eligible, 89% have applied (55% of organizations).

KEY INSIGHTS

- Of note, organizations that operate a venue (62%) are more likely than those that do not (42%) to have applied (confirmed or not confirmed) for the *Canada Emergency Wage Subsidy*.

Program	Confirmed	Applied, not confirmed	Intend to apply	Not eligible/not applicable
Emergency Support Fund for Cultural, Heritage and Sport Organizations	55%	2%	5%	38%
Canada Emergency Wage Subsidy	51%		3%	45%
Canada Emergency Business Account	35%		4%	61%
Canada Emergency Commercial Rent Assistance/Subsidy	12%	2%	7%	79%
Emergency Community Support Fund	6%	7%	4%	83%
Extension of the Work-Share Program				97%

- Confirmed
- Applied, not confirmed
- Intend to apply
- Not eligible/not applicable

Note: Answers of "not sure" have been removed from calculations.
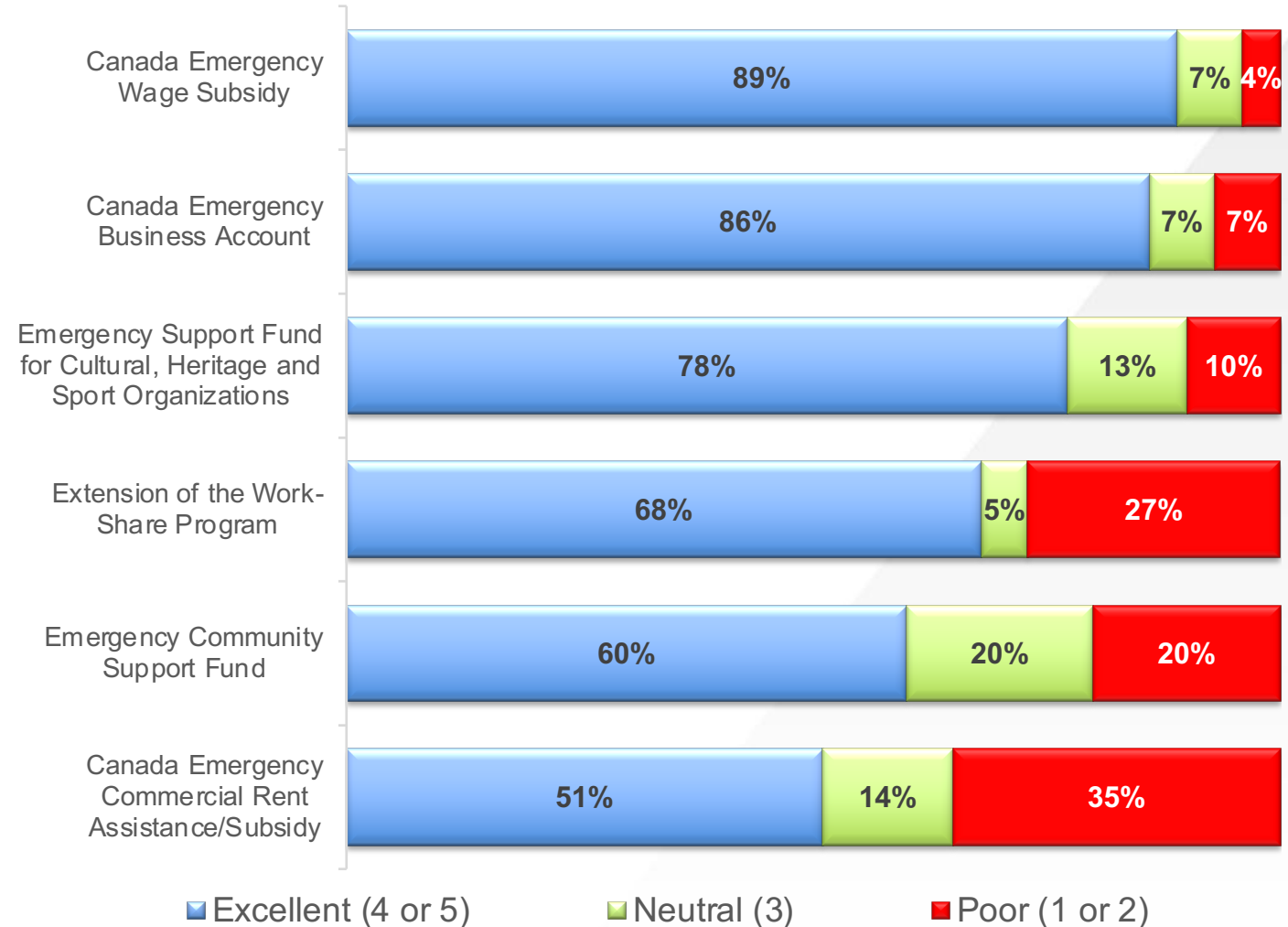
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Perceptions of government supports

Please indicate your rating of the following government supports:

- Organizations are most positive about the *Canada Emergency Wage Subsidy* and *Canada Emergency Business Account*.

KEY INSIGHTS

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

Support	Excellent (4 or 5)	Neutral (3)	Poor (1 or 2)
Canada Emergency Wage Subsidy	89%	7%	4%
Canada Emergency Business Account	86%	7%	7%
Emergency Support Fund for Cultural, Heritage and Sport Organizations	78%	13%	10%
Extension of the Work-Share Program	68%	5%	27%
Emergency Community Support Fund	60%	20%	20%
Canada Emergency Commercial Rent Assistance/Subsidy	51%	14%	35%

■ Excellent (4 or 5)   ■ Neutral (3)   ■ Poor (1 or 2)

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

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Comments about Canada Emergency Wage Subsidy

- 19% provided comments about this program, most commonly saying *the program was a lifeline/allowed us to continue to operate* (4%), *they are not eligible because staff are contractors* (4%), *it is a great program* (3%), and the *application process was complicated* (3%).
- Below are comments from organizations, highlighting some of the common themes.

"The CEWS program is a tremendous support; however, the calculations to apply are complex and language used has created fear with finance/admin staff that if we're audited they will be penalized. We are analyzing and tracking to the best of our ability and in good faith."

"It would be very helpful if this also applied to contracted workers. We would be able to continue paying our nine contracted workers we had in spring. Instead, we weren't able to renew three of the contracts and had to reduce the amount we were paying four of the others."

"It is so complicated our bookkeeper could not work with it. We have had to ask our auditor's firm to take it on. I wonder how much it is going to cost?"

Comments about Emergency Support Fund for Cultural, Heritage and Sport Organizations

- Only 17% provided comments about this program, most commonly saying *they were not eligible due to size/funding* (3%), *eligibility requirements were unfair* (3%), *process was fast/smooth* (3%), *there were too many reductions in the level of support* (2%), and *the program was great* (2%).

"Dance is not eligible because we do not have a 'governing body.' This is quite unfair as I have only certified dance instructors who have paid to get a certification to ensure we are properly training our dancers. I think if a studio supplies certified teachers, we should be able to have a governing body."

"The percentage approach meant that in this community, the funds disproportionately favoured sectors (music, ballet) where Canada Council grants are the highest. Hopefully a merit- and case-based approach will be used for any future recovery and support funds."

"This was great - this is the funding we were able to 'tap' into (Heritage and Sport organizations) but ONLY because we have a 'collection.' For us, this application was the easiest, quickest, and helped us significantly in terms of amount. Other heritage organizations (i.e., folklore, history, language) weren't able to access it, though, because they didn't have traditional 'collections'. So sport groups, art groups, and traditional heritage groups (i.e., museums) get funding, but other less traditional heritage organizations don't?"
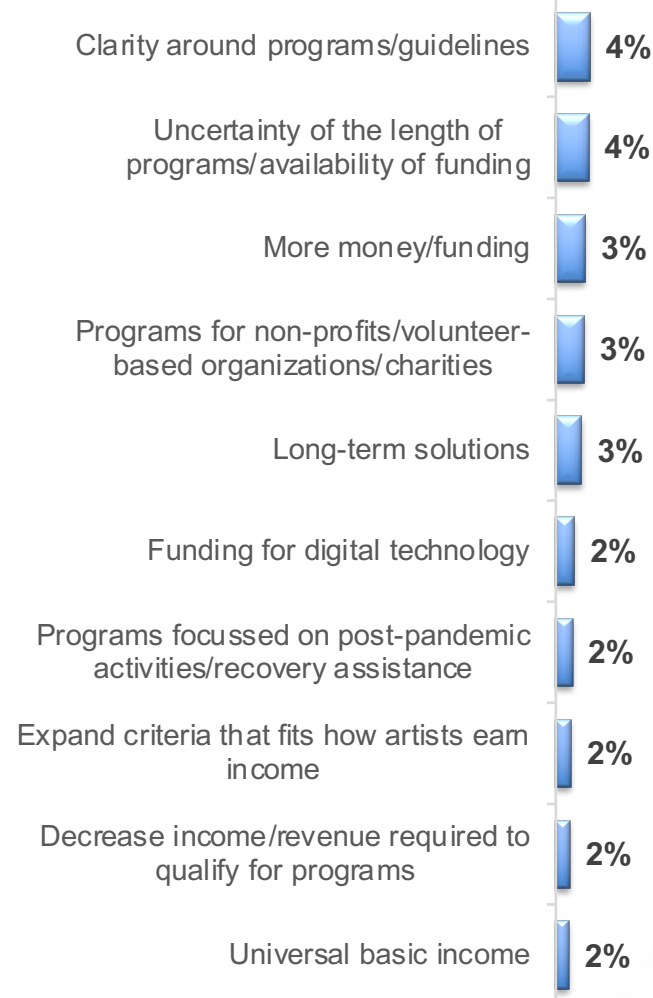
Comments on other programs

- **Canada Emergency Business Account.** Only 8% provided comments about this program, most commonly saying *the program provided short-term cash flow* (1%), *there was not enough information about program changes* (1%), they were *not eligible because staff are contractors* (1%), or *it is a great program* (1%).

- **Canada Emergency Commercial Rent Assistance/Subsidy**. Only 8% provided comments about this program, most commonly saying it was *hard to deal with other organizations (e.g., landlords)* (4%), it was a *great program* (1%), they were *not eligible* (9%), and *the application process was difficult* (1%).

- **Emergency Community Support Fund**. Only 3% provided comments about this program, most commonly saying it was *a great program* (1%) or the *program was not beneficial, so did not apply* (1%).

- **Extension of the Work-Share Program**. Only one organization 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.

Gap	%
Clarity around programs/guidelines	4%
Uncertainty of the length of programs/availability of funding	4%
More money/funding	3%
Programs for non-profits/volunteer-based organizations/charities	3%
Long-term solutions	3%
Funding for digital technology	2%
Programs focussed on post-pandemic activities/recovery assistance	2%
Expand criteria that fits how artists earn income	2%
Decrease income/revenue required to qualify for programs	2%
Universal basic income	2%

Note: Organizations could give more than one answer.

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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, media/news*, and *emailed newsletters*.

Category	Percent
Government announcements and sector websites	80%
Media/news outlets	76%
Emailed newsletters	73%
Social media	62%
Friends and colleagues	60%
Industry or discipline-specific peer meetings	58%
National peer meetings	48%
Provincial peer meetings	47%
Regional peer meetings	42%
Other	6%
None	<1%

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

Prepared by PRA Inc.

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 4% 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 6.3 sources on average, whereas those who rate themselves a 1 out of 5 use 3 sources on average.

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

71%	25%	4%

■ Feel informed (4 or 5)   ■ Neutral (3)   ■ Don't feel informed (1 or 2)
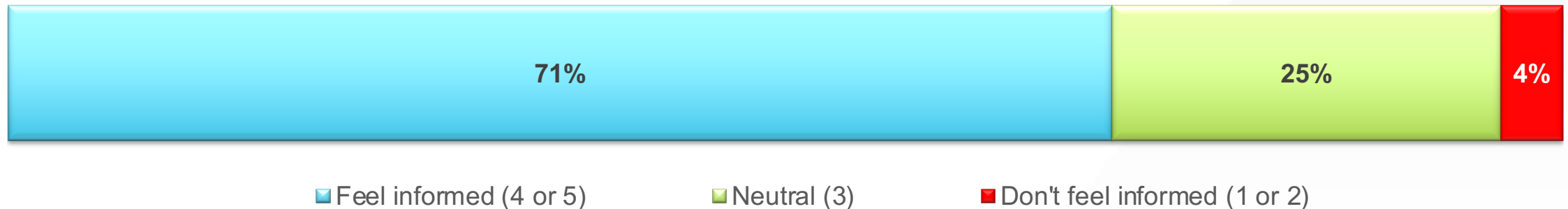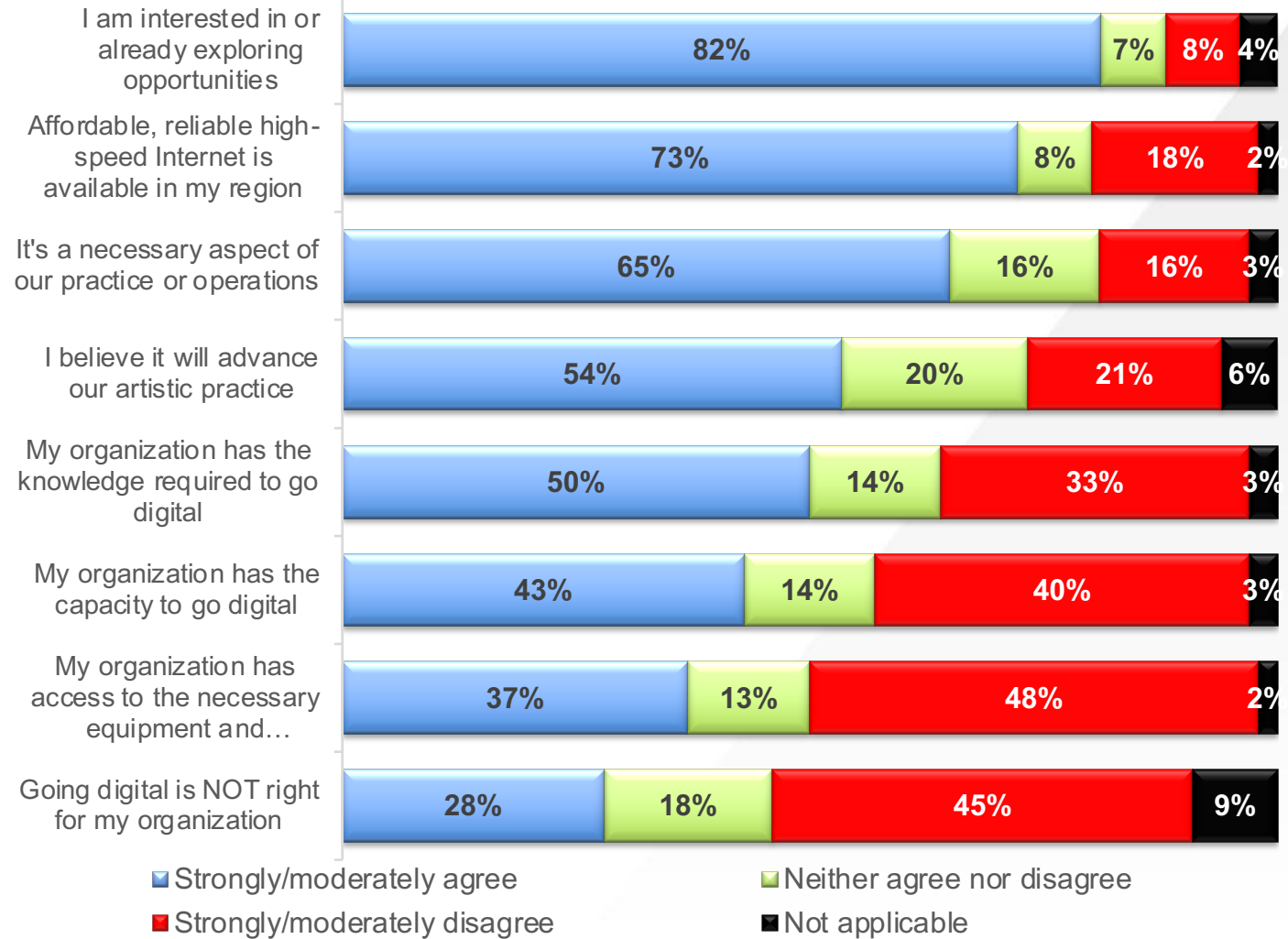
Pivoting to digital programming

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 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.

Statement	Strongly/moderately agree	Neither agree nor disagree	Strongly/moderately disagree	Not applicable
I am interested in or already exploring opportunities	82%	7%	8%	4%
Affordable, reliable high-speed Internet is available in my region	73%	8%	18%	2%
It's a necessary aspect of our practice or operations	65%	16%	16%	3%
I believe it will advance our artistic practice	54%	20%	21%	6%
My organization has the knowledge required to go digital	50%	14%	33%	3%
My organization has the capacity to go digital	43%	14%	40%	3%
My organization has access to the necessary equipment and…	37%	13%	48%	2%
Going digital is NOT right for my organization	28%	18%	45%	9%

- Strongly/moderately agree
- Neither agree nor disagree
- Strongly/moderately disagree
- Not applicable

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 3% 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.

	Low/very low	Neutral	Very high/high
Stress and anxiety before COVID-19	26%	49%	25%
Stress and anxiety today	4%	17%	79%
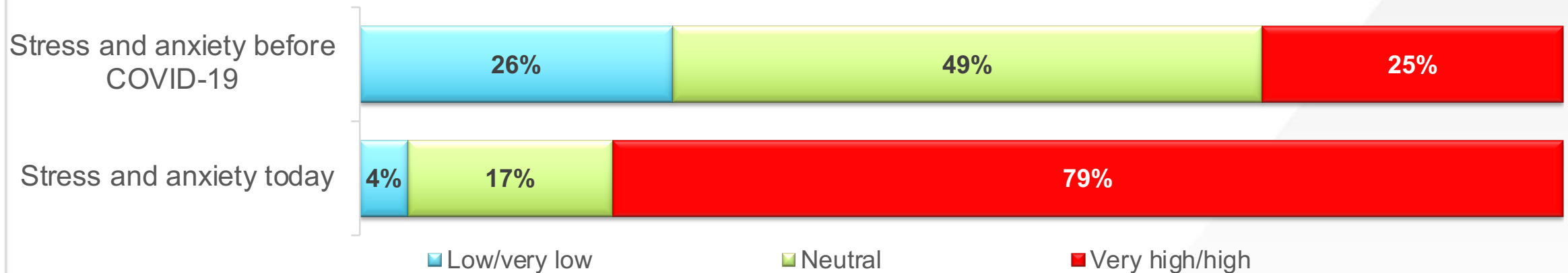
Optimism for recovery

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.

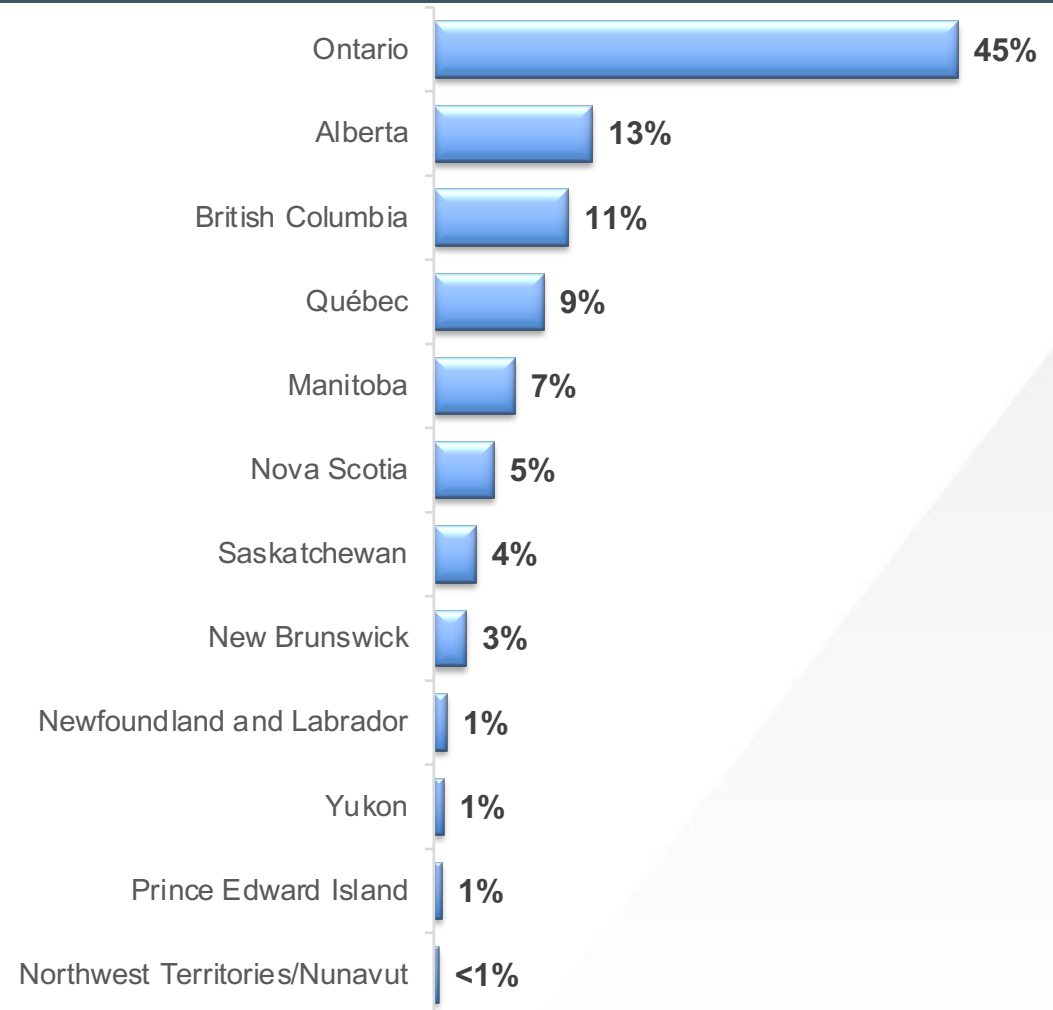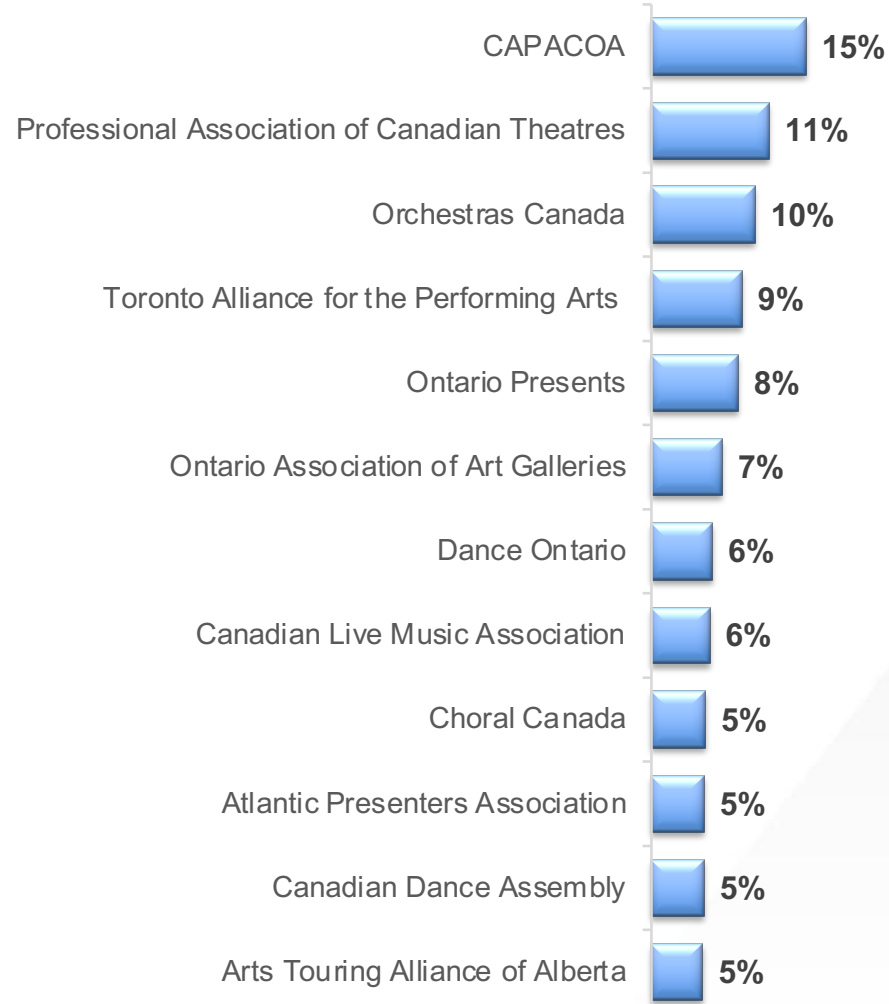|	Very/somewhat optimistic	Neutral	Very/somewhat pessimistic
Organization's ability to recover	67%	17%	16%
Arts and culture sector across Canada ability to recover	42%	17%	41%
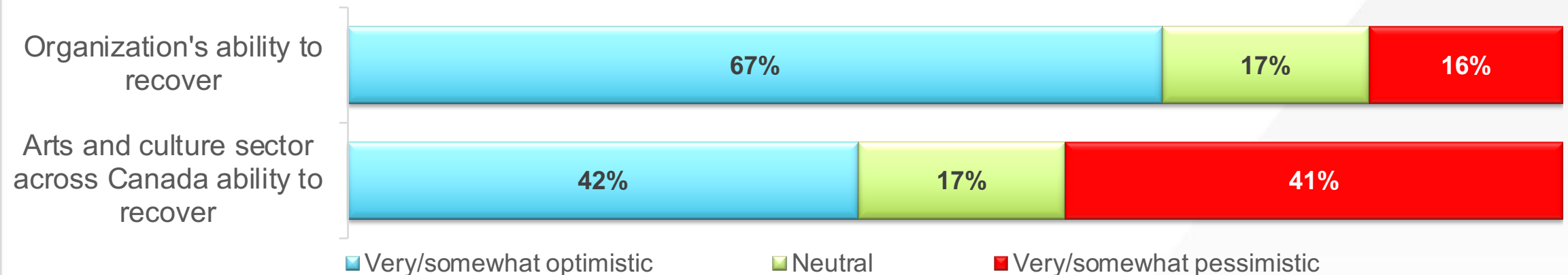
Profile of organizations

- 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 organizations) and British Columbia (18% of artists in the 2016 census compared to 11% of responding organizations).

Province	Percentage
Ontario	45%
Alberta	13%
British Columbia	11%
Québec	9%
Manitoba	7%
Nova Scotia	5%
Saskatchewan	4%
New Brunswick	3%
Newfoundland and Labrador	1%
Yukon	1%
Prince Edward Island	1%
Northwest Territories/Nunavut	<1%

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Which of the following arts service organizations do you have the closest affiliation with?
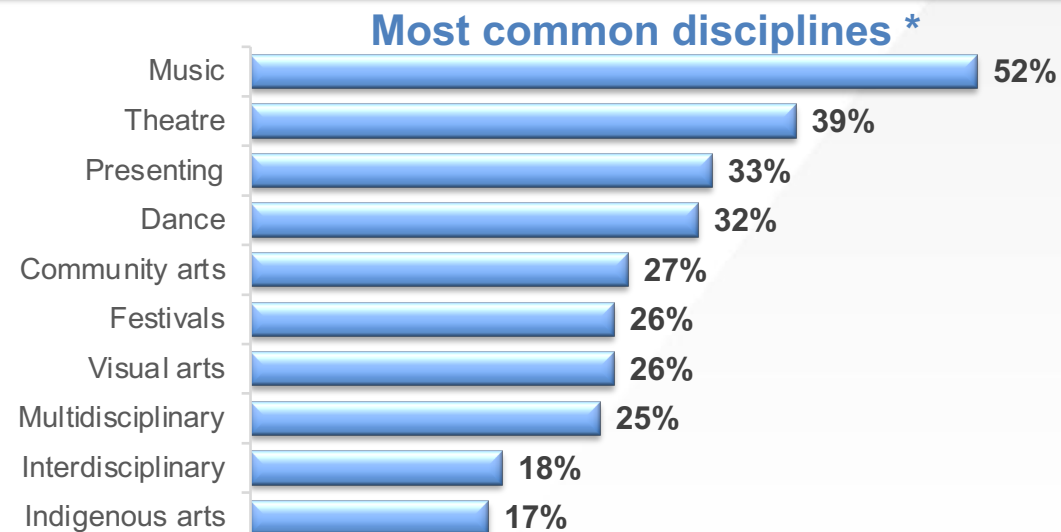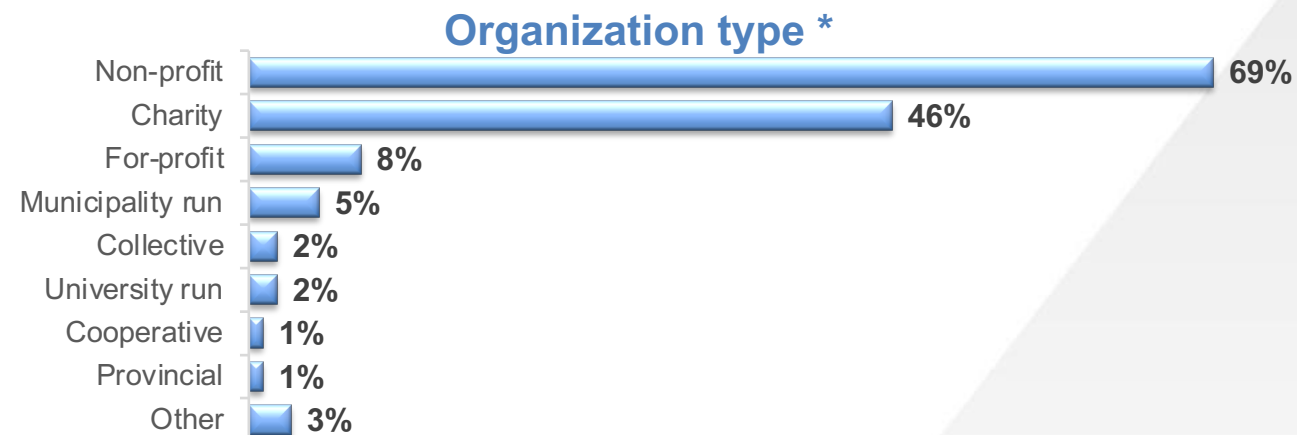
- Organizations could select from 32 different service organizations to whom they felt most affiliated. The graph to the right shows those organizations selected by at least 5% of respondents.

Organization	Percentage
CAPACOA	15%
Professional Association of Canadian Theatres	11%
Orchestras Canada	10%
Toronto Alliance for the Performing Arts	9%
Ontario Presents	8%
Ontario Association of Art Galleries	7%
Dance Ontario	6%
Canadian Live Music Association	6%
Choral Canada	5%
Atlantic Presenters Association	5%
Canadian Dance Assembly	5%
Arts Touring Alliance of Alberta	5%

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

Prepared by PRA Inc.

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 the 10 most commonly selected are shown.
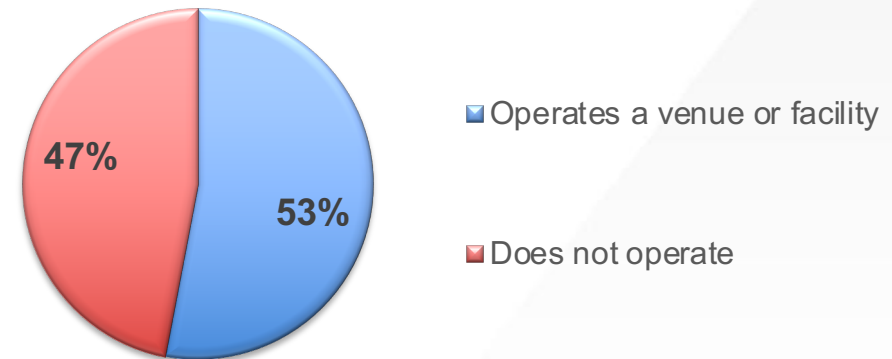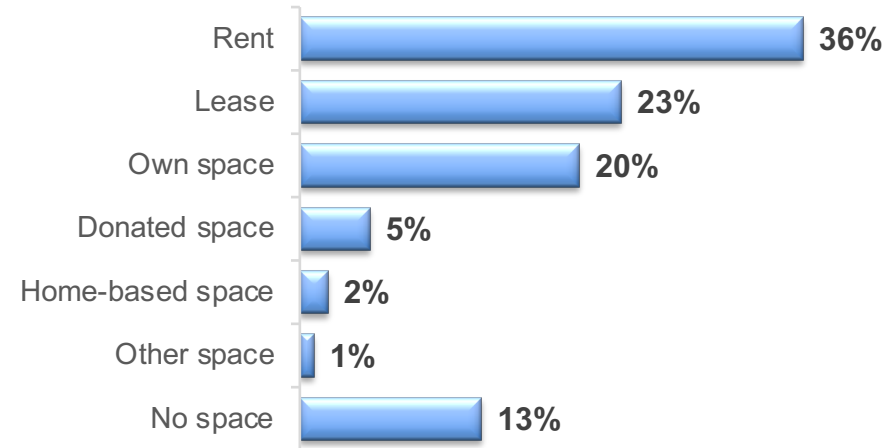
Organization type *

Non-profit	69%
Charity	46%
For-profit	8%
Municipality run	5%
Collective	2%
University run	2%
Cooperative	1%
Provincial	1%
Other	3%

Most common disciplines *

Music	52%
Theatre	39%
Presenting	33%
Dance	32%
Community arts	27%
Festivals	26%
Visual arts	26%
Multidisciplinary	25%
Interdisciplinary	18%
Indigenous arts	17%

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

Prepared by PRA Inc.

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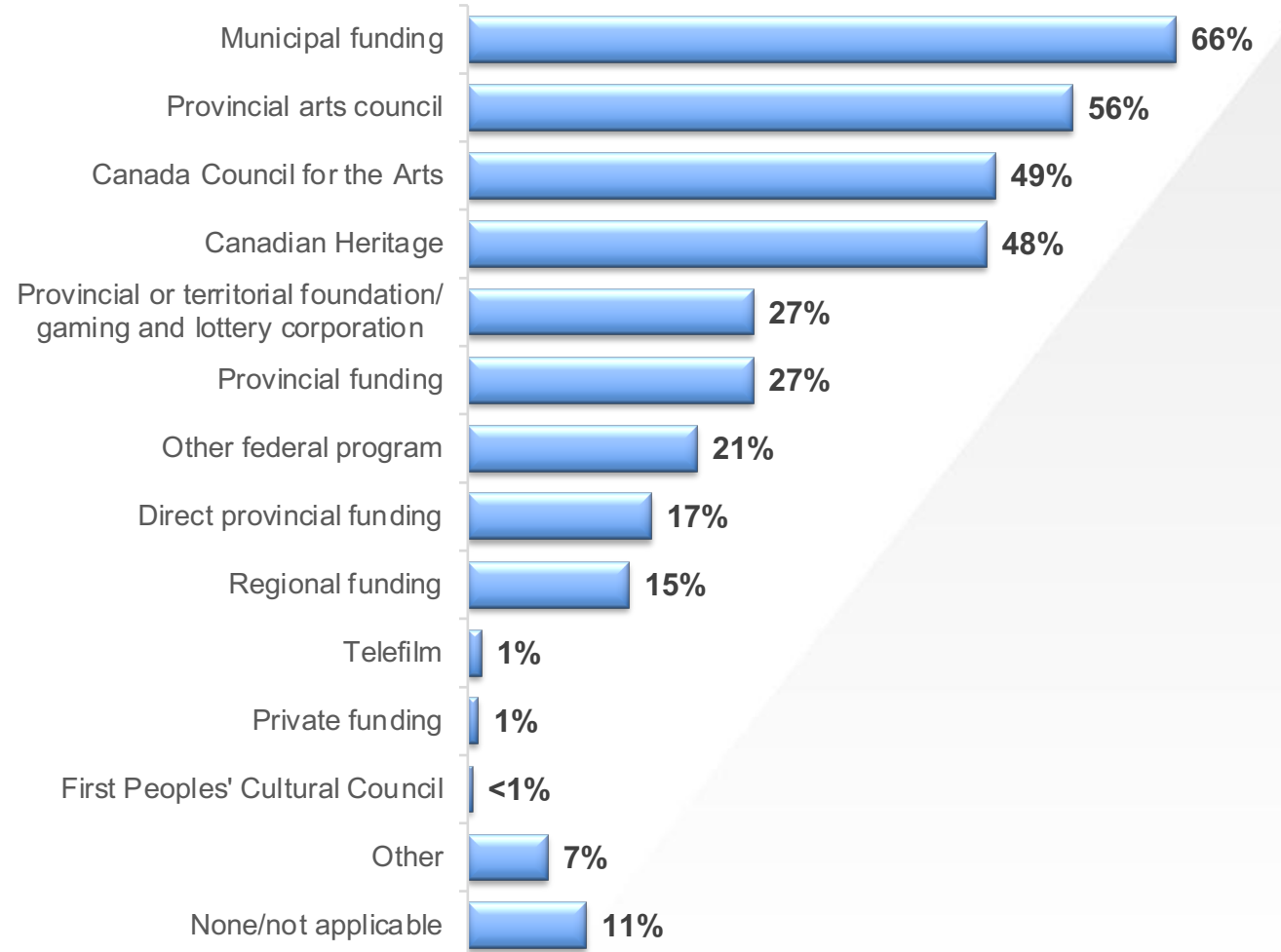
- The vast majority of organizations have some type of space, most commonly renting or leasing their space.
- Organizations are split almost 50/50 in terms of those who operate or do not operate space.

Category	Percentage
Rent	36%
Lease	23%
Own space	20%
Donated space	5%
Home-based space	2%
Other space	1%
No space	13%

- 47% Does not operate
- 53% Operates a venue or facility

Prepared by PRA Inc.

Funder

- 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*.
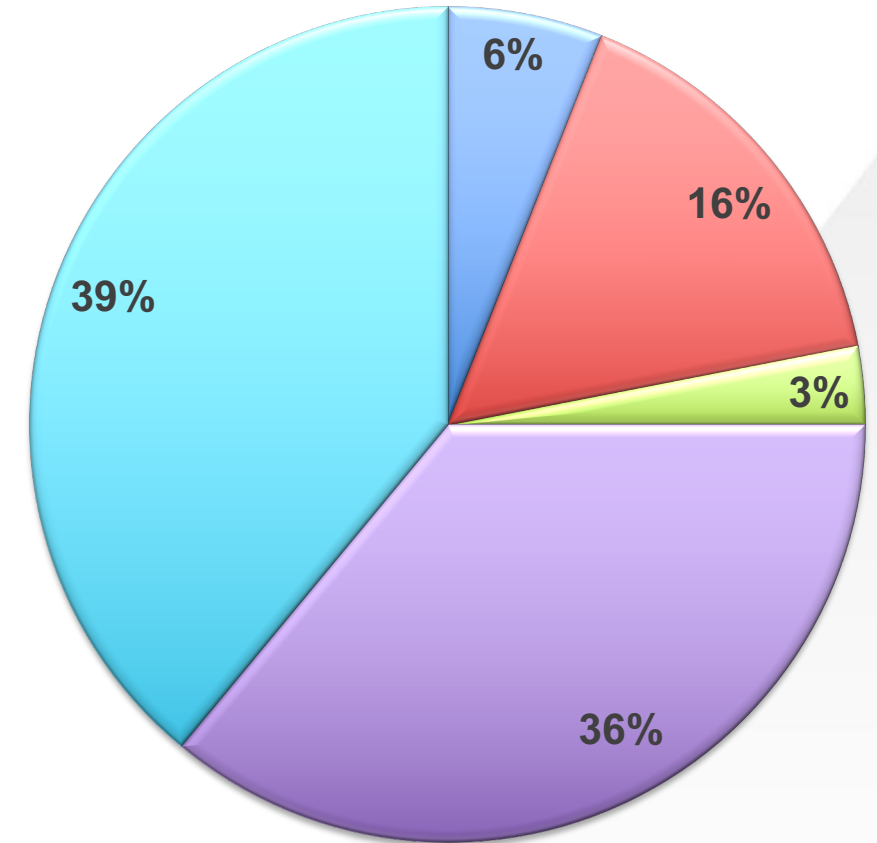
Funding source	%
Municipal funding	66%
Provincial arts council	56%
Canada Council for the Arts	49%
Canadian Heritage	48%
Provincial or territorial foundation/ gaming and lottery corporation	27%
Provincial funding	27%
Other federal program	21%
Direct provincial funding	17%
Regional funding	15%
Telefilm	1%
Private funding	1%
First Peoples' Cultural Council	<1%
Other	7%
None/not applicable	11%

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

Prepared by PRA Inc.

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
- Additionally, organizations renting (31%) or leasing (34%) space are about twice as likely to use CADAC compared to organizations who own their space (16%) or do not have a space (12%).

Pie chart:
- Less than 1: 6%
- Between 1 and 5: 16%
- Greater than 5: 3%
- Do not use CADAC: 36%
- Unsure: 39%

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