

**Ongoing impacts of COVID-19 on CRD
funded arts organizations**
Submitted: March 19, 2021



Capital Regional District
Arts & Culture Support Service

Summary

Open with adaptations

Most arts organizations (88.2%) are now operating with modifications. The remainder (11.8%) are not operating, but anticipate reopening. None are operating as usual.

Reduced budgets, but with less severe losses than predicted

Eighty percent of organizations reported that COVID-19 has had a negative effect on their overall budget.

2020 financial losses for organizations were less severe than predicted in June 2020, with 39.2% (20) of organizations reporting no financial loss caused by COVID-19 in 2020.

Uncertainty around space and staffing/ FTEs

By February 2021, 11.8% (4) reported being unable to retain their space through the COVID-19 pandemic, compared to 15.9% (6) in June 2020.

The percentage of organizations uncertain about their ability to retain their space dropped from 17.5% (7) to 5.9% (2).

Due to COVID-19, 21.2% of arts organizations with FTEs have laid off staff or anticipate having to do so. Another 12.1% remain unsure if staff will be laid off.

Cancelled programming and uncertainty continue into 2022

In 2020, nearly all arts organizations (96.1%) cancelled at least some programming, with 9.8% of organizations cancelling all programming for the year.

Overall, reporting organizations cancelled more programming than was anticipated in the June 2020 survey.

In 2021, 23.5% of organizations remain unsure about programming for the year and another 7.8% anticipate the cancellation of all programming in 2021.

Uncertainty remains high into 2022, with nearly half (47%) of organizations anticipate cancelling programming and another 49% being unsure about cancellations.

Replacing cancelled programming with innovative formats, leaning heavily on digital

Most arts organizations (84.3%) have found alternative means of delivering programming and engaging with their audiences and communities, relying heavily on digital formats.

Background

In February 2021, the CRD Arts and Culture Support Service conducted an online survey reaching out to the 75 arts organizations receiving CRD operating or project grants. The survey received responses between February 22 and March 3, 2021.

The purpose of the survey was to inform decision-making related to the funding of arts organizations and understand the ongoing administrative impact

of COVID-19 on arts organizations funded by the CRD.

This was a follow-up to a survey conducted in June 2020. For consistency we requested, where possible that the same representative complete the survey.

Limitations of this report

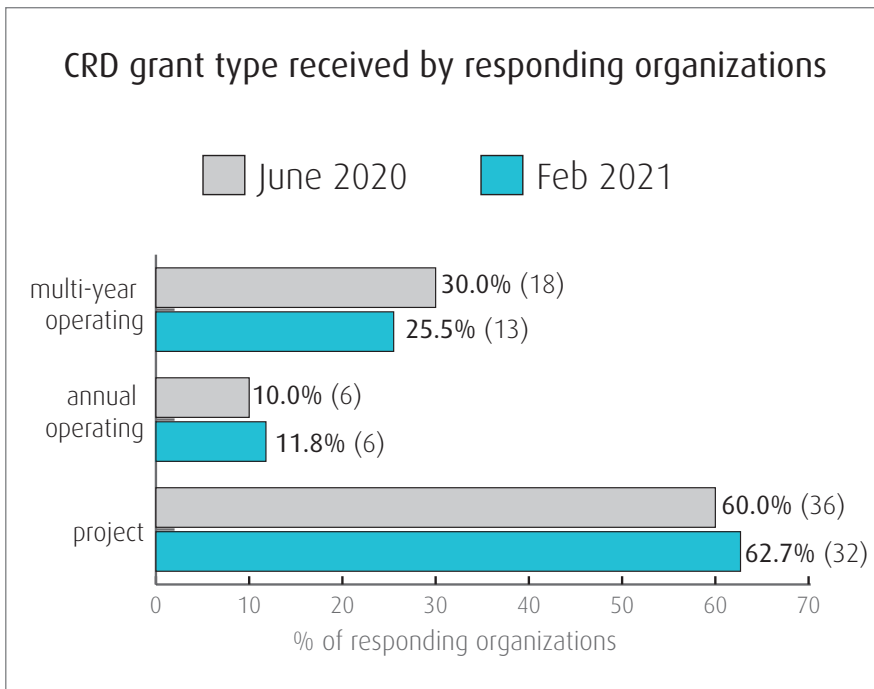
Not all organizations responded to this report, nor did the same arts organizations respond in all cases.

The statistical standard error hasn't been calculated for this report, therefore there is an uncalculated degree of uncertainty associated with these findings.

Responding organizations

Sixty arts organizations responded to the initial survey in June 2020, while 51 organizations responded to the February 2021 request. This is respectively an 80% and 68% response rate.

In 2021 there were five fewer responses from multi-year operating recipients and four fewer from project grant recipients when compared to the 2020 survey.



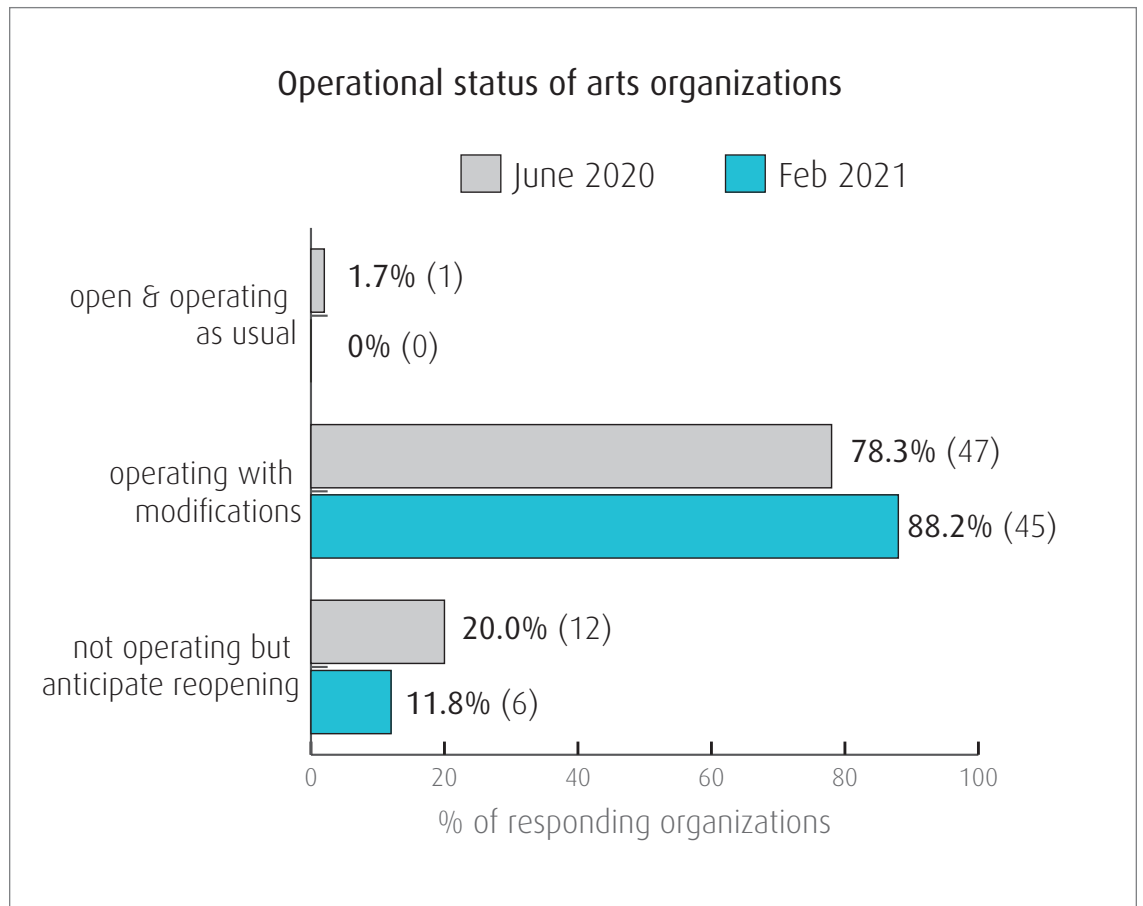
Operating status

Since June 2020, more arts organizations are operating with modifications.

A larger proportion of arts organizations are now operating with modifications (88.2%) than when surveyed last June.

Only 11.8% of organizations are currently non-operational.

None are operating as usual.

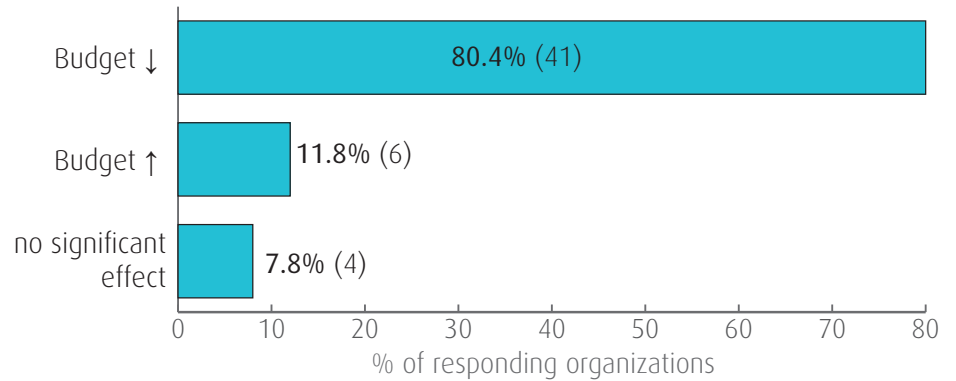


The budget of most arts organizations is shrinking due to COVID-19.

Most organizations (80.4%) reported that COVID-19 and related restrictions has had a negative effect on their overall budget.

Surprisingly, 11.8% (6) of organizations reported COVID-19 as having a positive effect on their budget.

Change in arts organization budgets between June 2020 & Feb 2021 due to COVID-19 & related restrictions

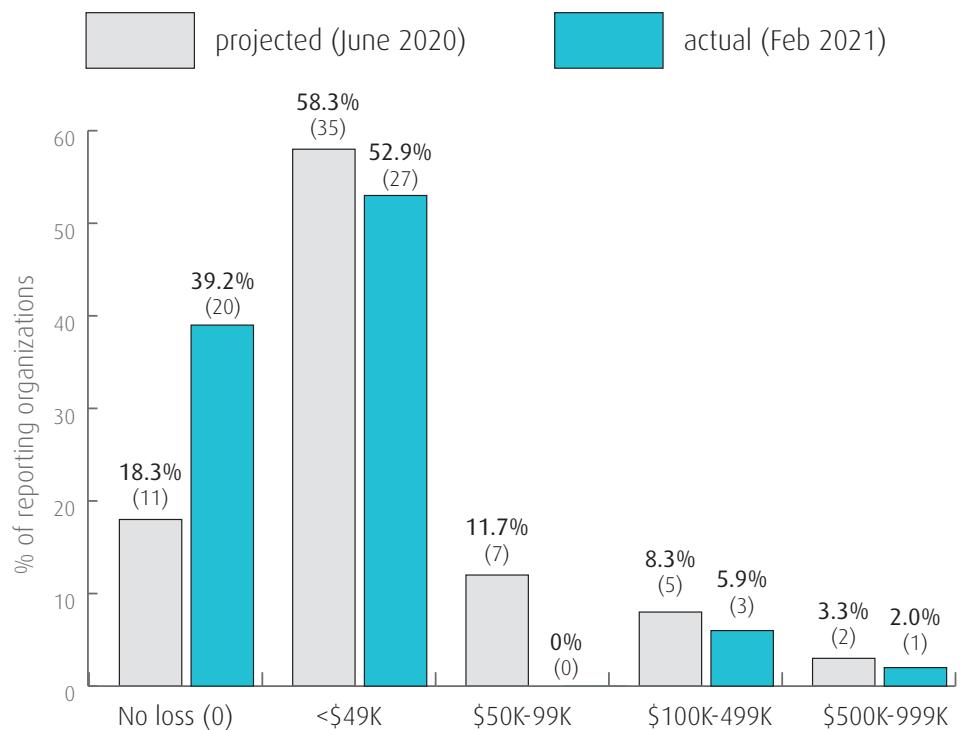


But 2020 financial losses were less severe than last year's predictions.

Actual financial losses for 2020 from organizations are smaller than June 2020 predictions, with 39.2% (20) of organizations reporting no financial loss caused by COVID-19 (compared to 18.3% (11) in projected).

52.9% (27) organizations reported a loss of less than \$49,000, 5.9% (3) of organizations reported a loss of \$100,000 - \$499,000 and 2.0% (1) of organizations reported a loss of between half a million and \$999,000.

2020 financial losses due to COVID-19 & related restrictions



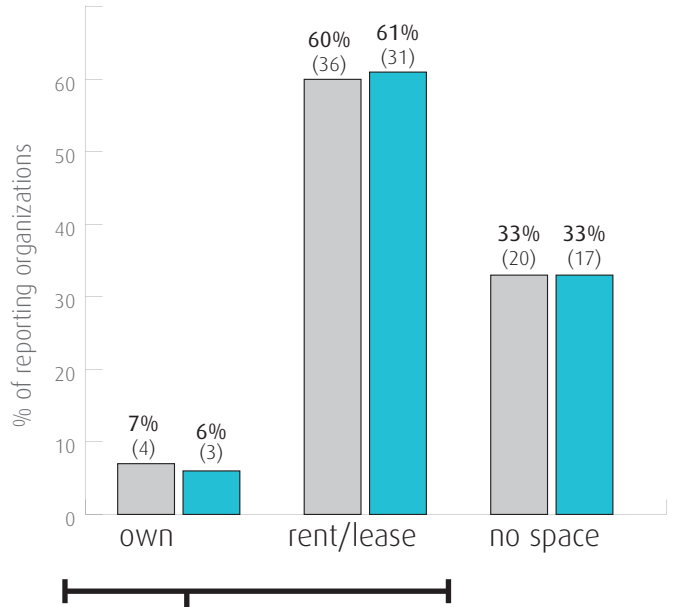
More organizations have been able to retain their space than predicted.

Before COVID-19, 61% of reporting organizations rented or leased, while 6% owned their space.

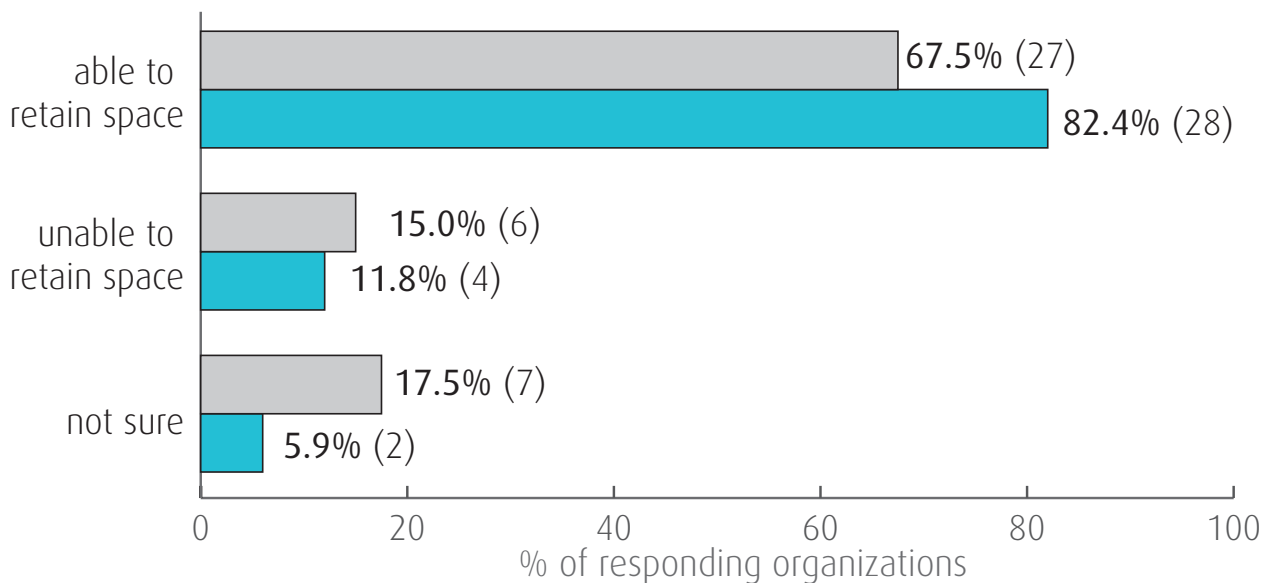
By February 2021, 11.8% (4) reported being unable to retain their space through the COVID-19 pandemic, compared to 15.0% (6) in June 2020.

Since June, the percentage of organizations uncertain about their ability to retain their space dropped from 17.5% (7) to 5.9% (2).

Pre-COVID art organization space arrangements



Ability of organizations to retain space arrangements over the course of the COVID-19 pandemic



Staffing

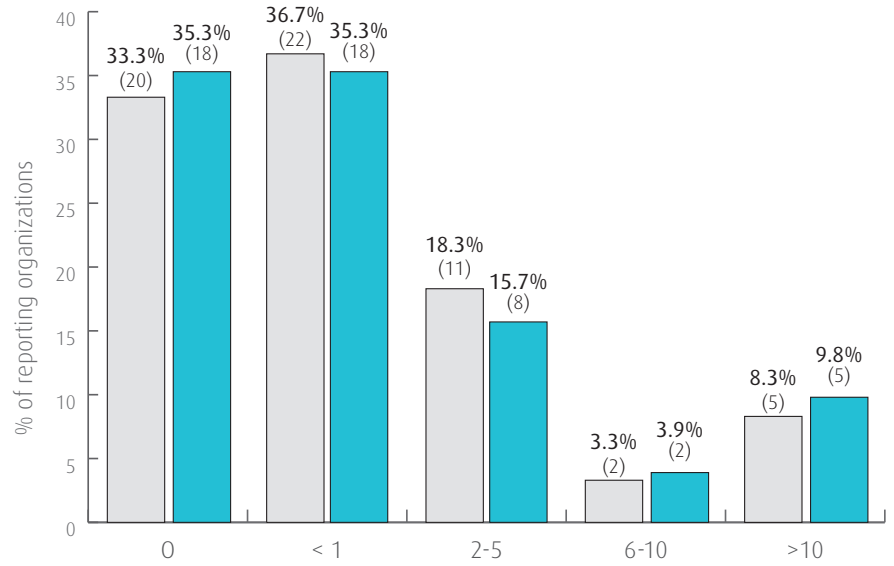
June 2020 ■ Feb 2021

About a third of organizations are anticipating lay-offs or are unsure.

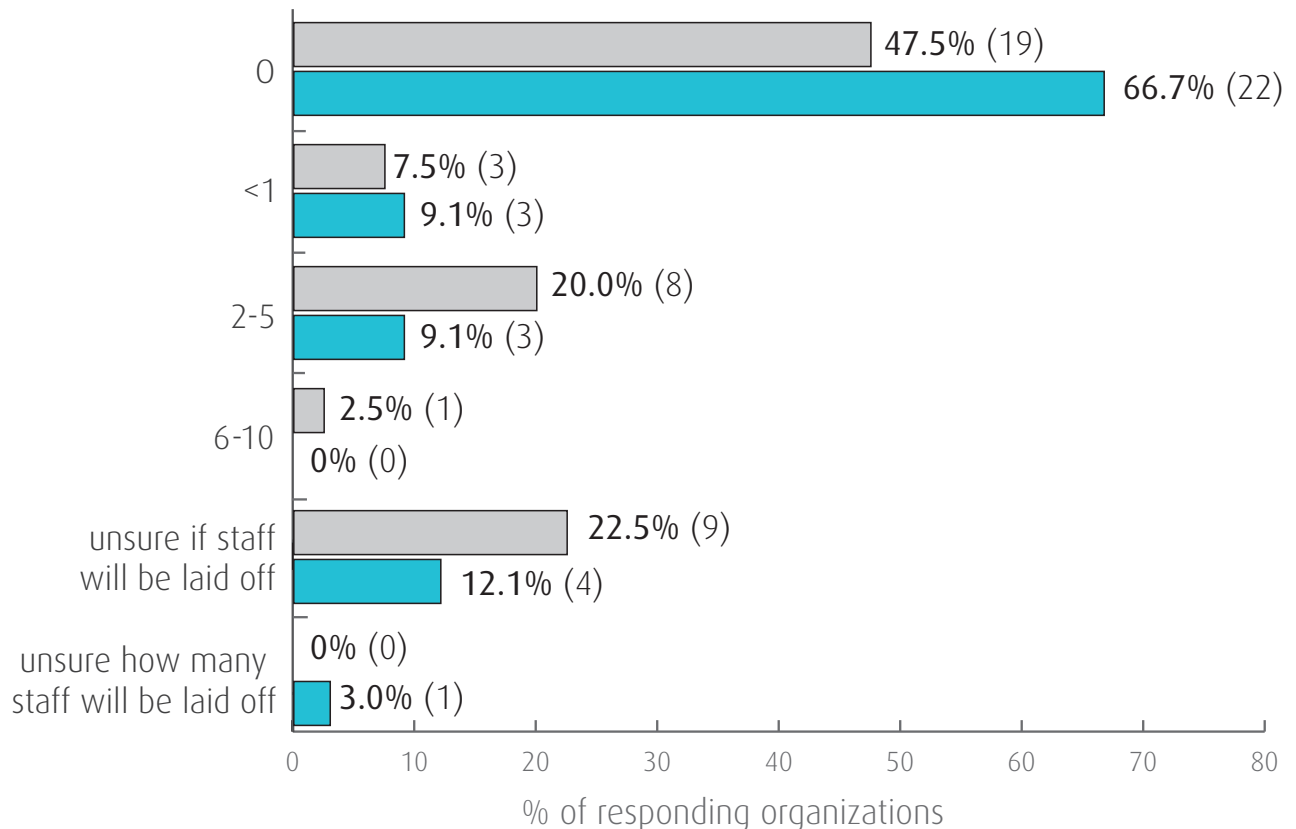
Before COVID-19, 64.7% of organizations had some staffing, with 29.4% having over 2 FTEs (Full Time Equivalents).

As a result of COVID-19, 21.2% of staffed organizations have laid off or anticipate having to lay-off staff, with another 12.1% being unsure if they will need to lay off staff.

Pre-COVID art organization FTEs (Full Time Equivalents)



Number of FTEs arts organizations have laid-off or anticipate laying off due to the COVID-19 pandemic



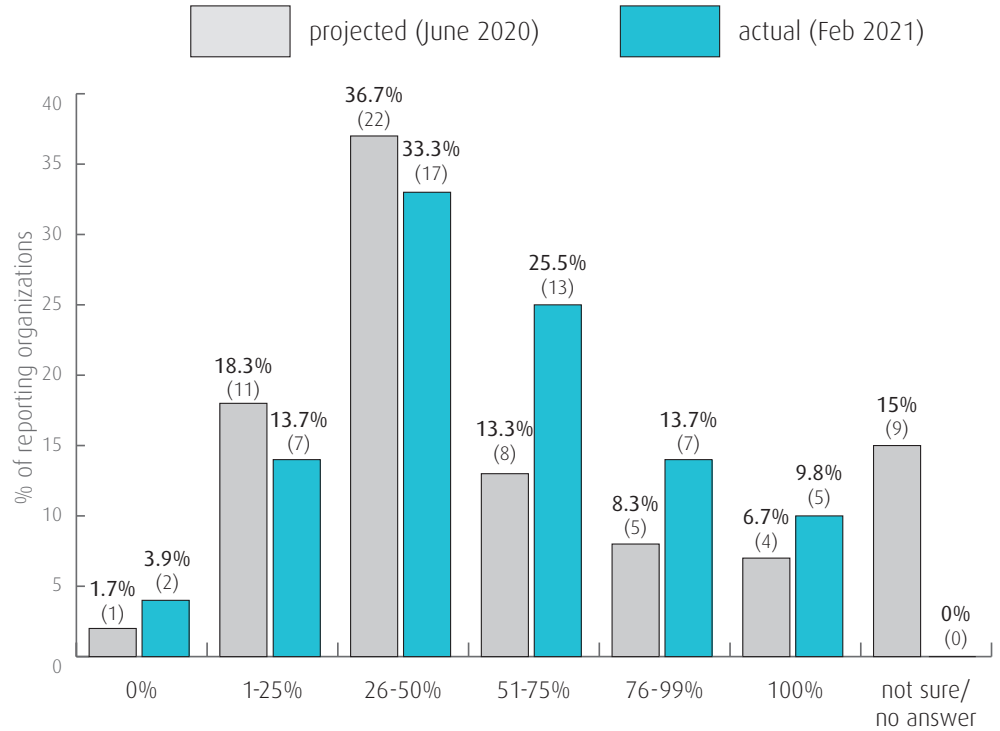
Programming

More programming was cancelled in 2020 than previously anticipated.

In 2020, nearly all (96.1%) of arts organizations cancelled some programming, with 9.8% of organizations cancelling all programming.

Overall, organizations cancelled more programming than was anticipated in the June 2020 survey.

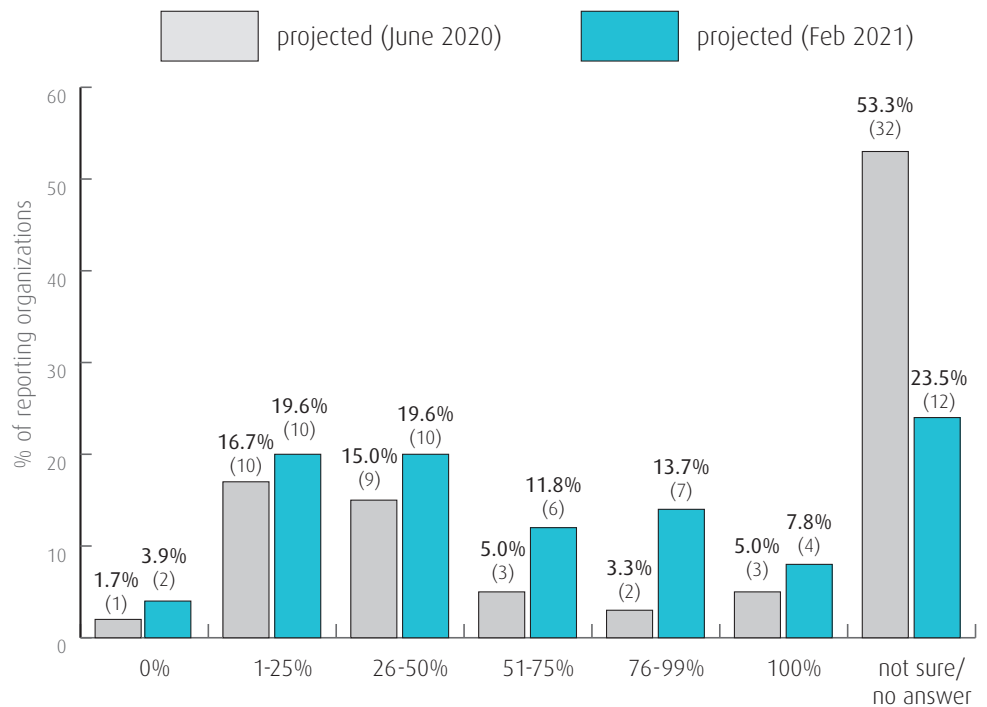
2020: Percentage of programming cancelled due to COVID-19 and related restrictions



More cancellations are anticipated in 2021.

Uncertainty for 2021 programming remains high, with 23.5% of organizations unsure about programming for the year and another 7.8% of organizations anticipate cancelling all programming in 2021.

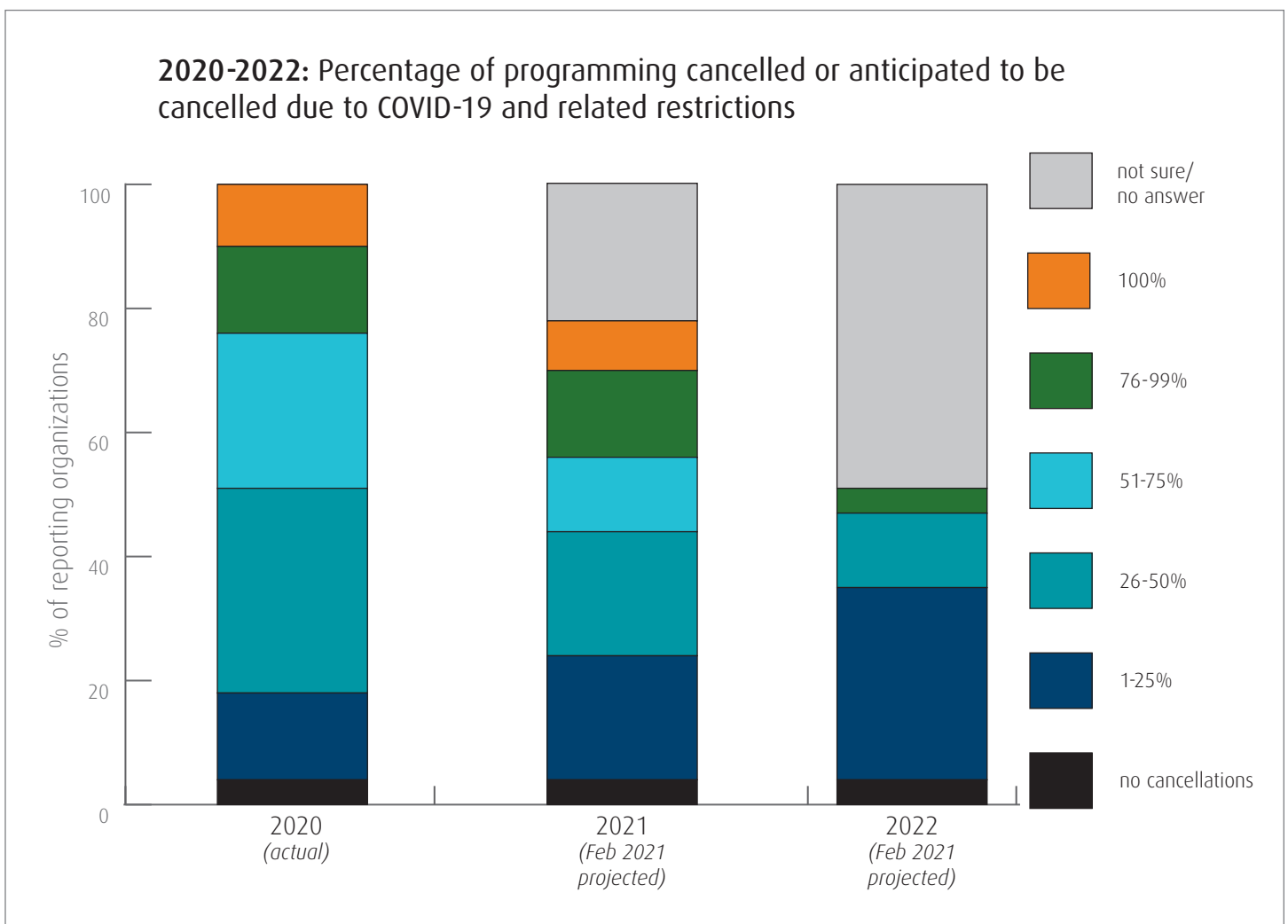
2021: Percentage of programming anticipated to be cancelled



Programming: Looking forward

Uncertainty remains about in-person programming into 2022.

Nearly half (47%) of reporting organizations anticipate cancelling programming into 2022, with another 49% being unsure.



Alternative Formats

June 2020 ■ Feb 2021

Arts organizations have been relying heavily on digital formats to replace in-person programming.

Most arts organizations (84.3%) are actively using alternative formats, with video formats and virtual forums and gatherings being the most popular.

Descriptions in the 'other' category included: summer outdoor concerts, in-person performances and outdoor touring with small audiences in accordance with guidelines, as well as online streaming of films and programs, and local broadcasts. Rehearsals are being conducted via zoom or in small in-person groups (when allowed under provincial health orders). Organizations also report developing web-based galleries and exhibitions, as well as commissioning media works.

