COVID-19 Impact Report
British Columbia
Arts & Culture Sector

Fall 2020

December 7, 2020

Produced by

GVPTA GREATER VANCOUVER PROFESSIONAL THEATRE ALLIANCE

The GVPTA acknowledges that we are based on the unceded territories of the Coast Salish Peoples, including the xʷməθkwəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and Səl̓ílwətaɬ (Tsleil-Waututh) Nations.

The COVID-19 pandemic has had a profound impact on the arts and culture sector. As part of a data collection strategy to gain an understanding of the impact in British Columbia, GVPTA developed a survey that was issued province-wide, and across artistic disciplines.

This report includes data collected between **October 26 and November 14, 2020**, through the **GVPTA COVID-19 B.C. Arts & Culture Impact Survey.**

GVPTA's previous impact report released on June 1, 2020, along with other COVID-19 related reports, can be found on our website at www.gvpta.ca.

Questions may be directed to GVPTA executive director, Kenji Maeda at kenji@gvpta.ca or 604-608-6799.

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Considerations:

- We acknowledge that the survey was in English language only, and conducted online. Many individuals are facing challenges that may impact their own capacity to fill out a survey.
- We recognize that measuring impact will continue to be a challenge as realities faced by individuals and communities across the province are changing rapidly. As with any survey, this data is only a partial representation of the impact COVID-19 has had on the arts and culture sector.
- Responses are affected by local outbreaks and updated regional and provincial health orders. The Provincial Health Officer issued new regional restrictions on November 7, affecting Vancouver Coastal Health and Fraser Health regions, which overlaps with survey responses which were received up until November 14.

Additional Details:

- The survey was distributed through a network of arts service organizations, funders, and stakeholders across the province, social media, newsletters, and directly to past impact survey respondents.
- Most questions within the survey were optional. Data in this report notes the number of responses ("n") for the question or response option.
- Previous survey responses were used to understand changes in sentiment to the same questions, and are noted as "May/June" data.

Further Analysis:

- If you are looking for other segmented information, by discipline, region, demographics, or others, email Kenji Maeda (kenji@gvpta.ca) with your specific request.

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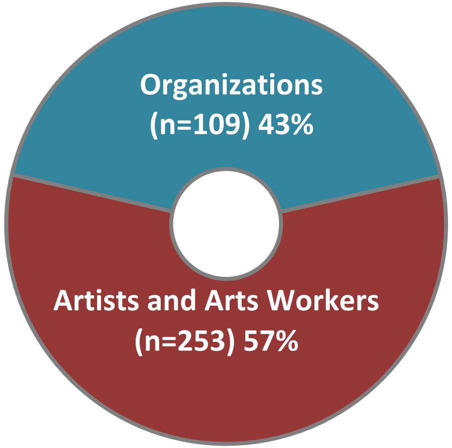
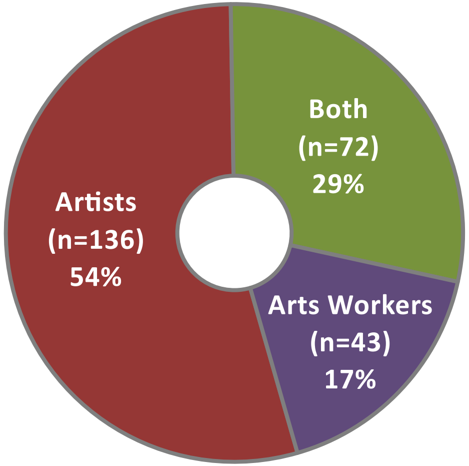
ALL RESPONDENTS

The Respondents: Organization vs Artists & Arts Workers

Of the 443 respondents, **57%** were individual **Artists & Arts Workers**, and the other **43%** responded on behalf of an **Organization**.

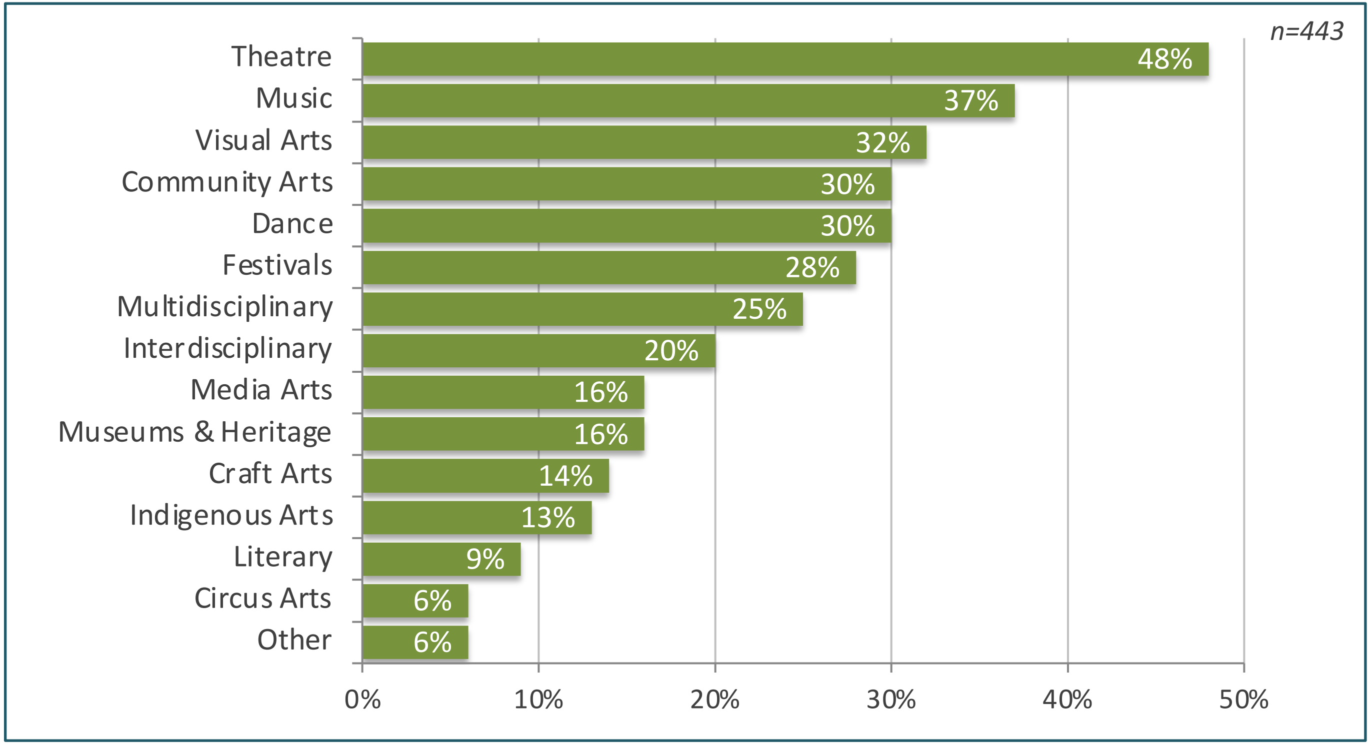


Of the 253 responding Artists & Arts Workers, **54%** identified as solely an **Artist**, **17%** as solely an **Arts Worker**, and **29%** as **Both** an Artist & Arts Worker.



ALL RESPONDENTS

The Respondents: Percentage of All Respondents by Discipline



What We See

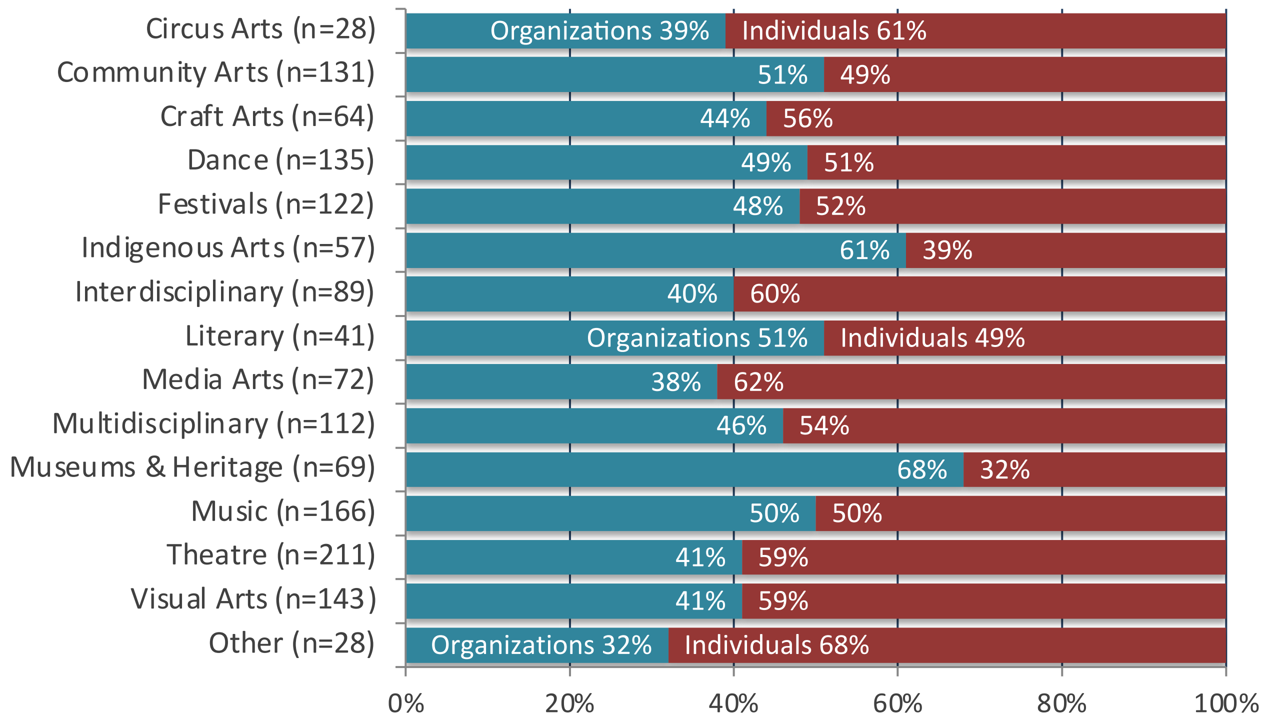
Each respondent was asked to self-identify with one or more disciplines. The top five disciplines included: **Theatre** (**48%**), **Music** (**37%**), **Visual Arts** (**32%**), along with **Dance** and **Community Arts** (tied with **30%**)

Respondents could select more than one discipline.

Question:
Which disciplines do you practice, work in, work with, or represent?

ALL RESPONDENTS

The Respondents: For **Each Discipline**, Percentage of Organizations vs Artists and Arts Workers



What We See

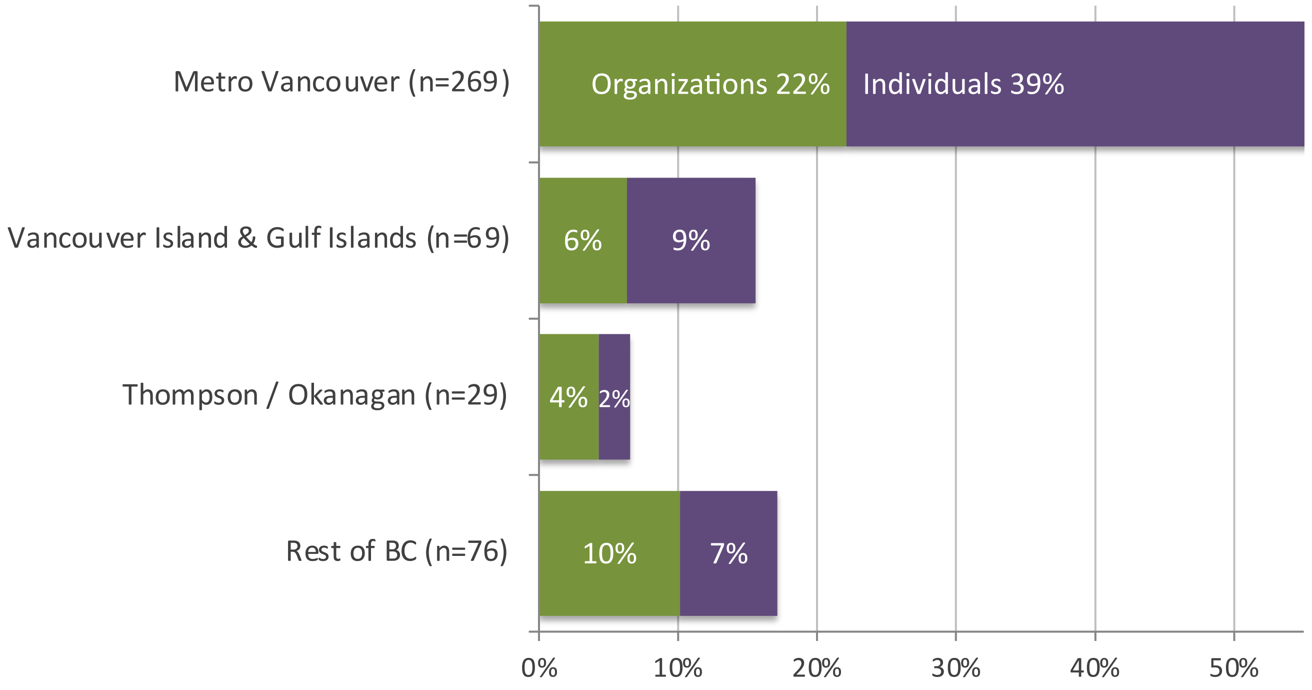
Of all respondents that self-identified a specific discipline, this chart shows the percentage of **individuals (artists and arts workers)** vs **organizations**.

Respondents could select more than one discipline.

Question:
Which disciplines do you practice, work in, work with, or represent?

ALL RESPONDENTS

The Respondents: Percentage of Respondents by Regional District



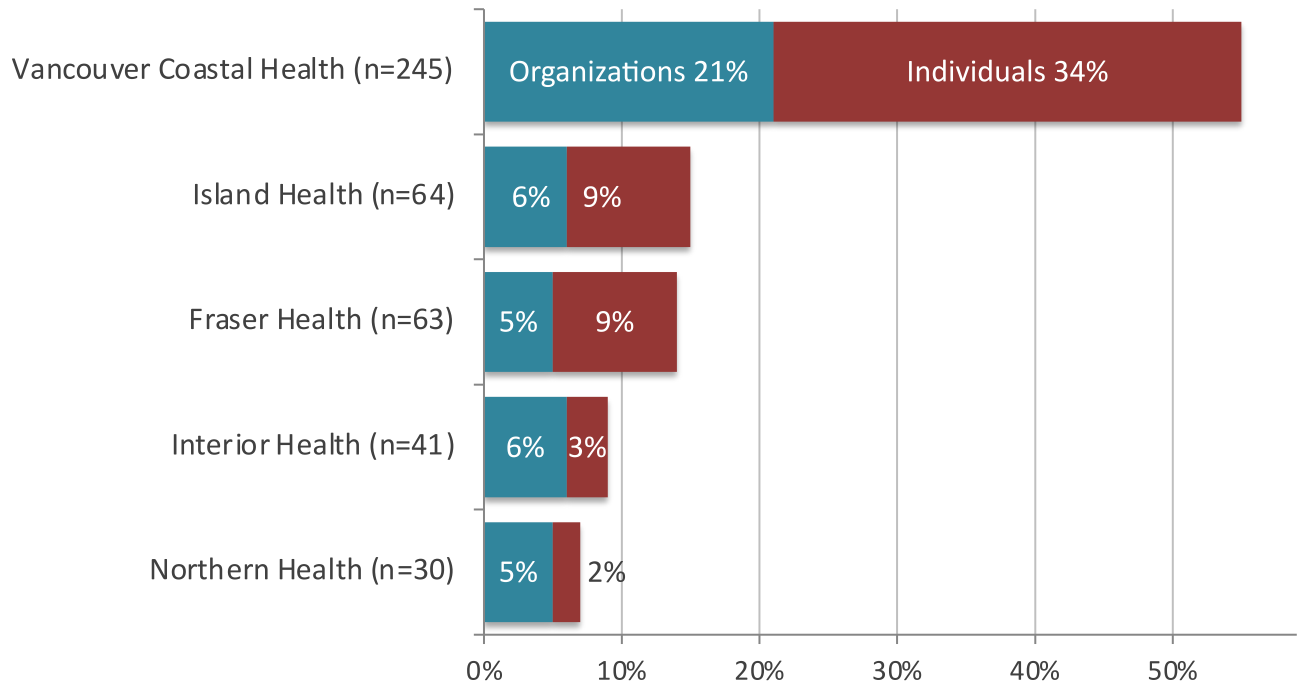
What We See

Responses from 26 (of 28) Regional Districts across B.C. were received.

The majority (**61%**) of respondents are based in Metro Vancouver.

ALL RESPONDENTS

The Respondents: Percentage of Respondents by Health Authority Region



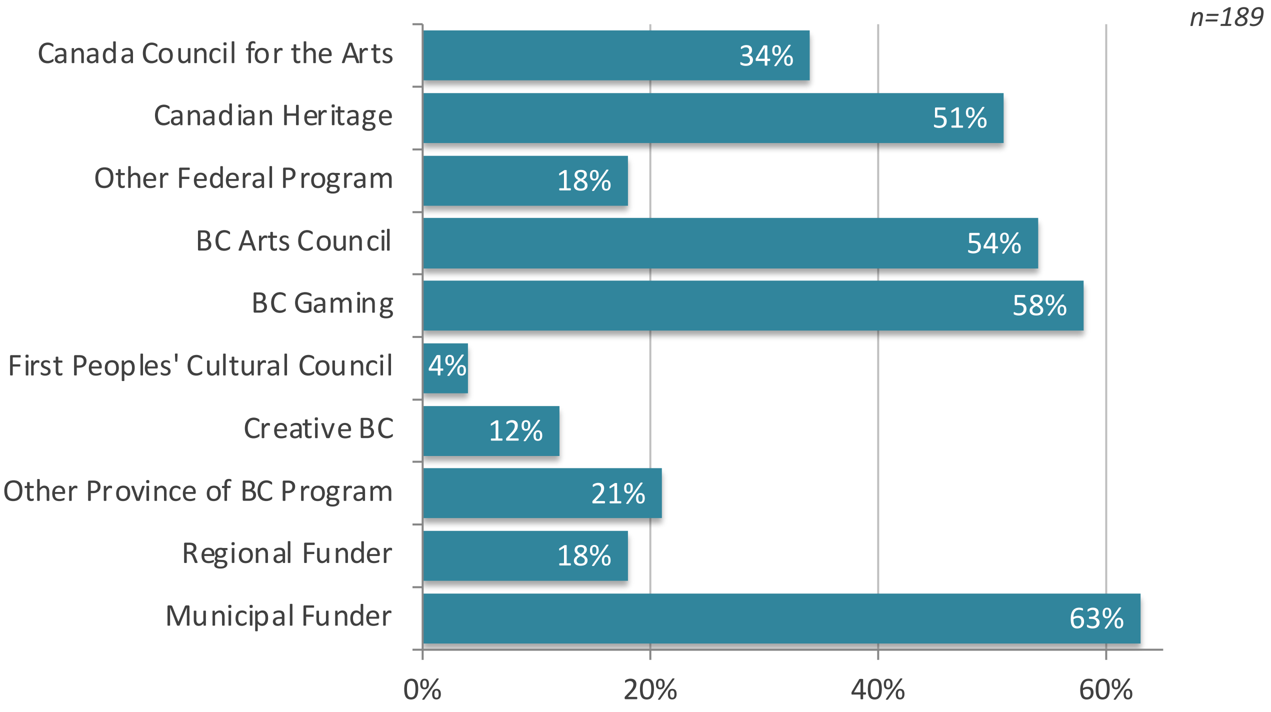
What We See

Responses from within all Health Authority regions were received.

The majority (**55%**) of respondents are based within the Vancouver Coastal Health catchment area.

ORGANIZATIONS

The Respondents: Sources of Funding between 2018-2020



What We See

The percentage of organization respondents that received **funding from each source**.

Some respondents received grants or contributions from multiple funders.

Question:
Select all public agencies you have received funding or support from at least once between 2018-2020.

ORGANIZATIONS

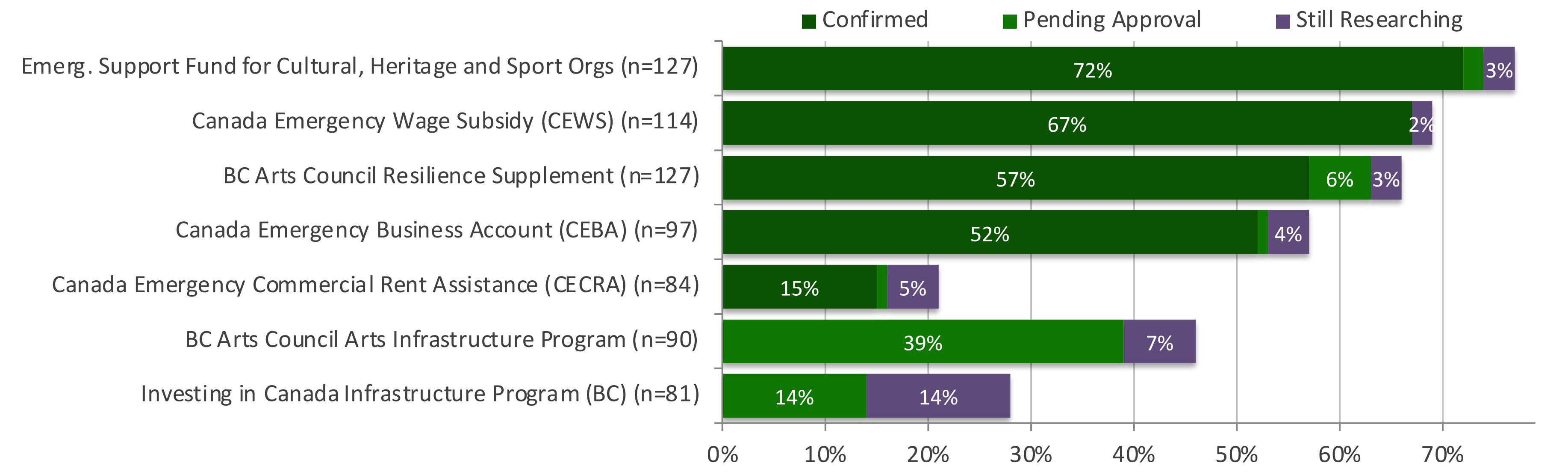
Government Support

What We See

Organizations received support through multiple programs, including the federal Emergency Support Fund for Cultural, Heritage and Sport organizations (**72%**), CEWS (**67%**), and BCAC Resilience Supplement (**57%**), and CEBA (**52%**).

The CECRA program, intended for a broad reach of the arts and culture sector was undersubscribed (**15%** confirmed, and **52%** stating ineligibility).

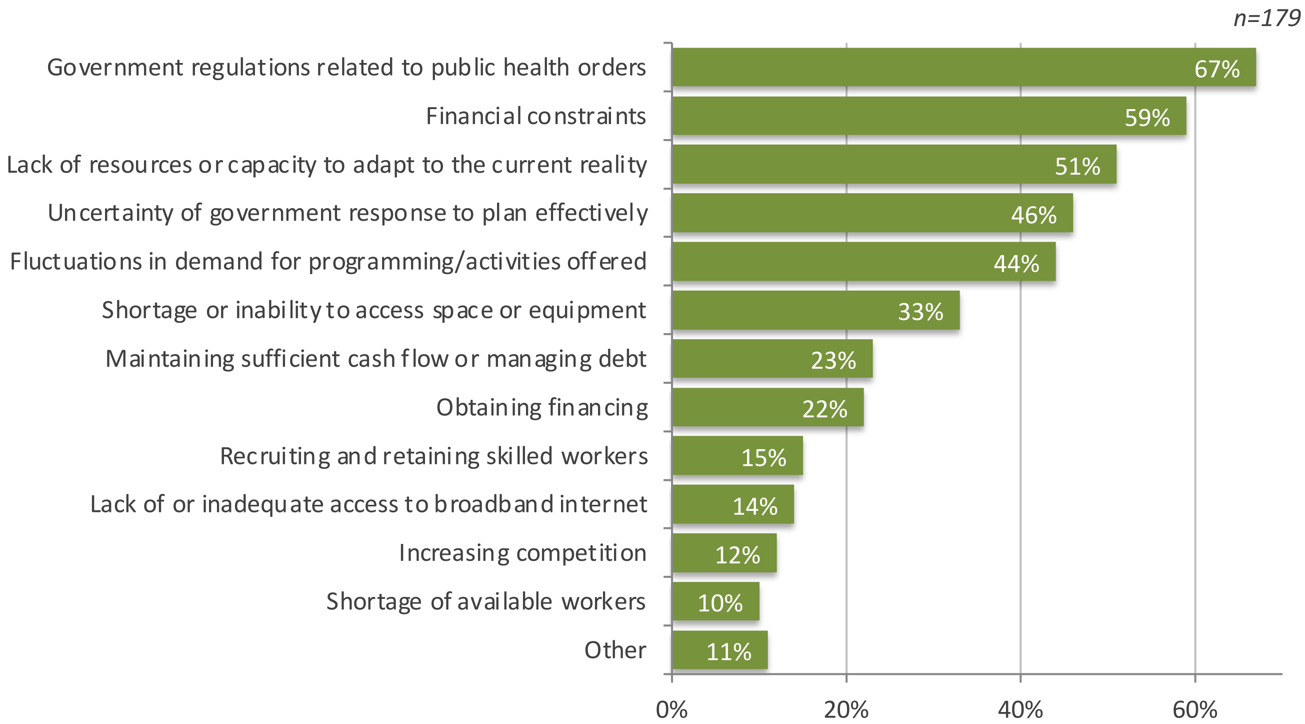
Which of the following relief supports have you already accessed or intend to access?



ORGANIZATIONS

Obstacles

Over the last THREE MONTHS (Aug-Oct), which of the following were **OBSTACLES** your organization has faced?



What We See

Most organizations identified multiple obstacles including current government regulations relating to public health orders (**67%**); financial constraints (**59%**), and lack of resources or capacity to adapt (**51%**).

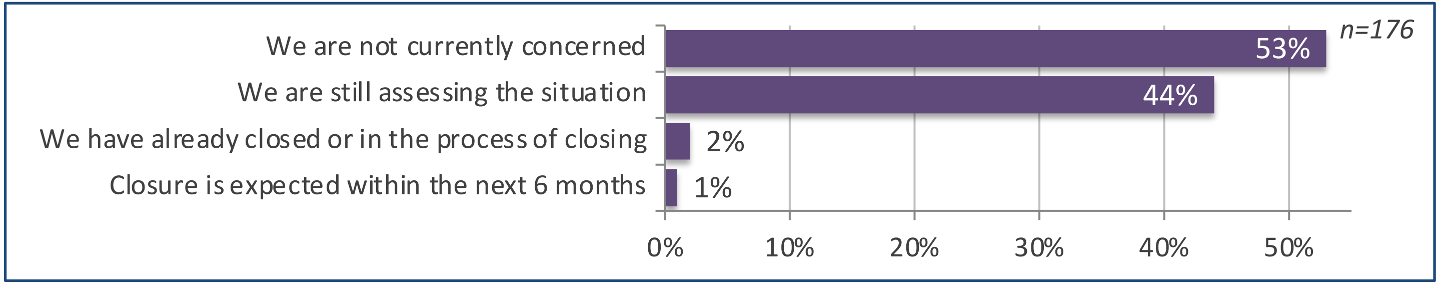
Other challenges include areas of government response, changes in demand, and cash flow.

Respondents could select more than one option.

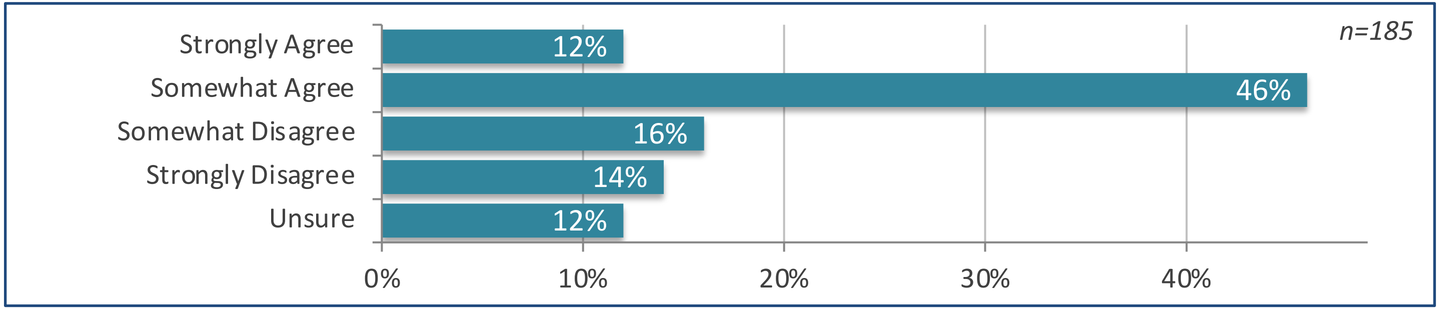
ORGANIZATIONS

Threats

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



Respond to this statement: “Our organization is FINANCIALLY prepared for the second wave of COVID-19.”



What We See

While **53%** of organizations are <u>not currently concerned</u> about a **permanent closure**, **44%** are still <u>assessing the situation</u>. **3%** have already <u>closed or expected to close</u>.

58% of respondents **<u>strongly or somewhat agree</u>** that their **organization is financially prepared for the second wave of COVID-19**, with **30%** **<u>somewhat or strongly disagree</u>** with the statement.

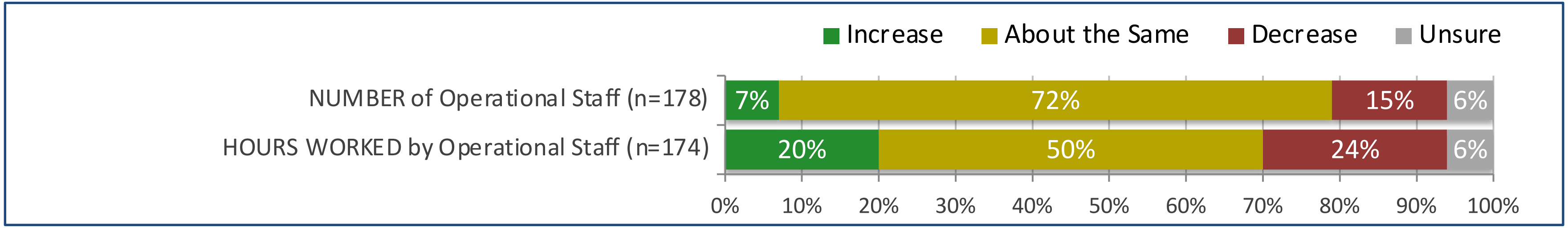
ORGANIZATIONS

Employment

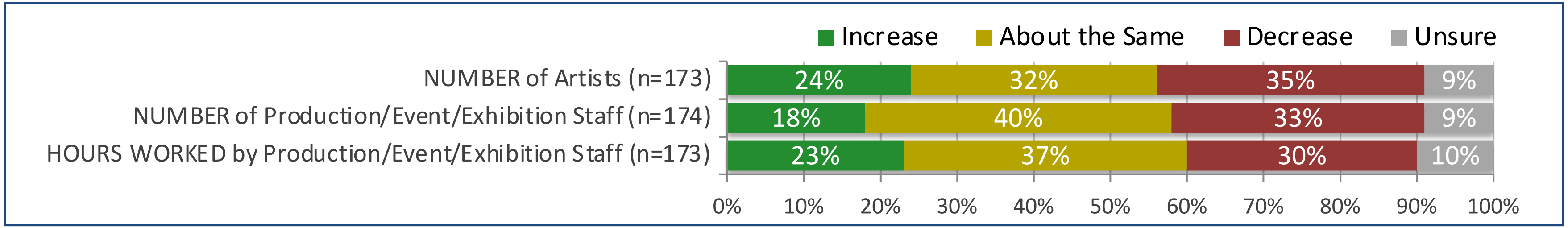
What We See

We expect to see a **net decrease** in the number of staff (operational and production), and artist contracts, along with a **net decrease** in hours worked **over the next three months**, compared to the previous period.

Comparing the last 3 months to the next 3 months, how do you expect your **operational staff** levels to change?



Comparing the last 3 months to the next 3 months, how do you expect your **artist contracts** and **staffing** levels for **production, events, and exhibitions** to change?



ORGANIZATIONS

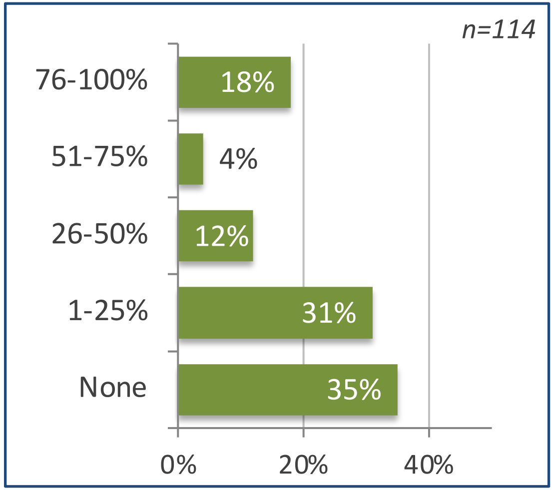
Remote Work

What We See

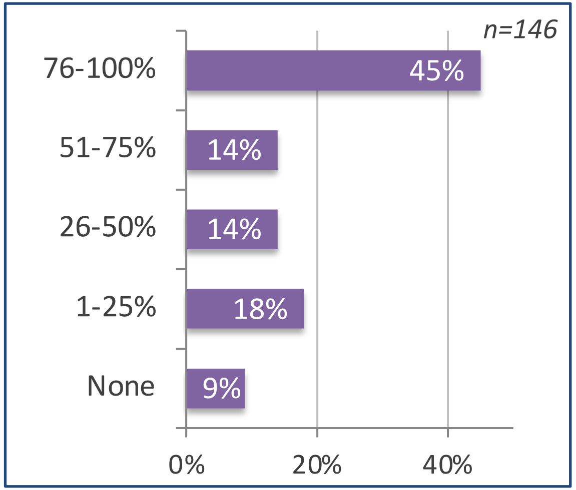
The pandemic has created a lasting impact on how organizations operate. **35%** reported **none of their operational** staff/contractors worked remotely (50% or more of their hours) **pre-pandemic**, while only **14%** of organizations expect the same **after vaccines are available and physical distancing guidelines are loosened or lifted.**

What percentage of your **operational staff/contractors** were working, or are expected to work, remotely (50% or more of their hours)…

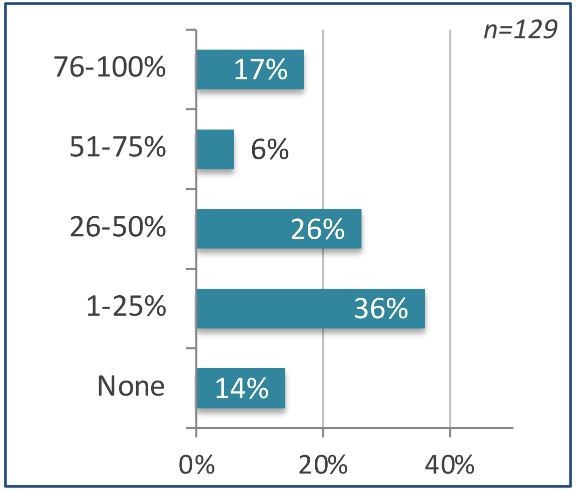
…before the pandemic



…in September 2020



…after vaccines are available and physical distancing guidelines loosened



ORGANIZATIONS

Remote Work
with vs without a venue or facility

What percentage of your **operational staff/contractors** have been, or are expected to, work remotely (50% or more of their hours)…

What We See

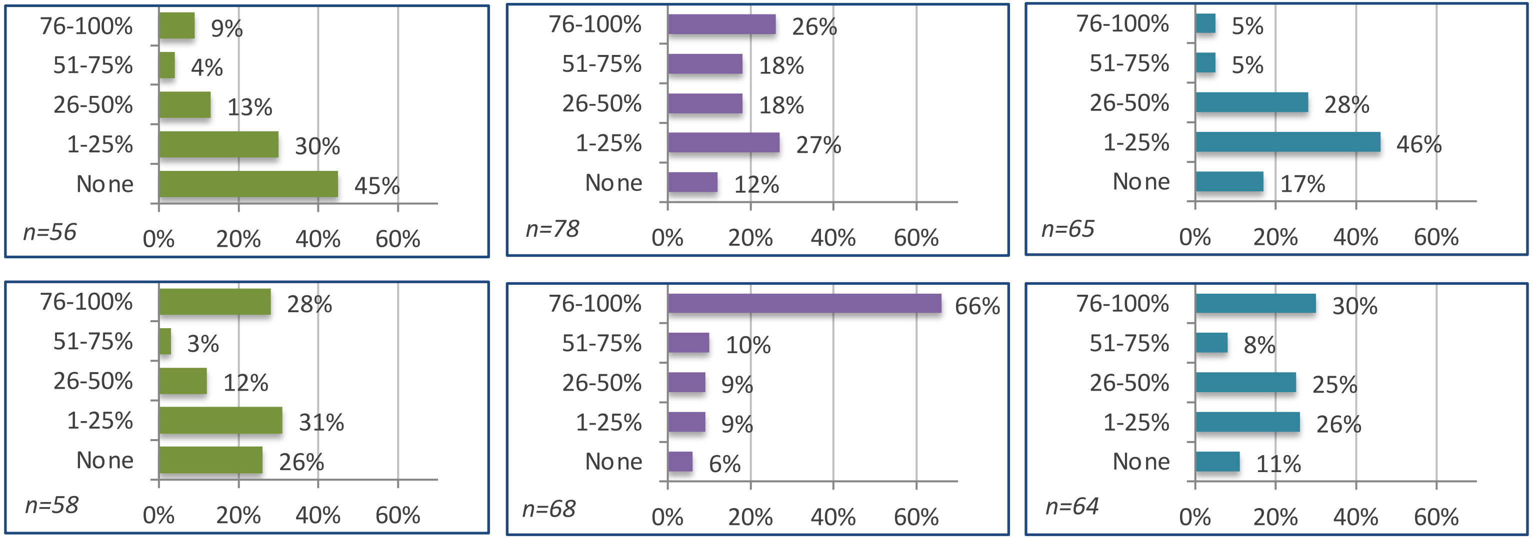
In **September**, **66%** of organizations without a facility had **more than three-quarters** of their operational staff working remotely (50% or more of their hours) compared to **26%** of those with a venue or facility.

Most organizations expect to increase their remote staff **after vaccines are available** compared to **pre-pandemic**, but more organizations without a facility (**38%**) expect to have **more than half** of their operational staff working remotely, compared to those with a facility (**10%**).

…before the pandemic | …in September 2020 | …after vaccines are available and physical distancing guidelines loosened

Organizations that **operate a venue or facility** used for programming or non-administrative activities

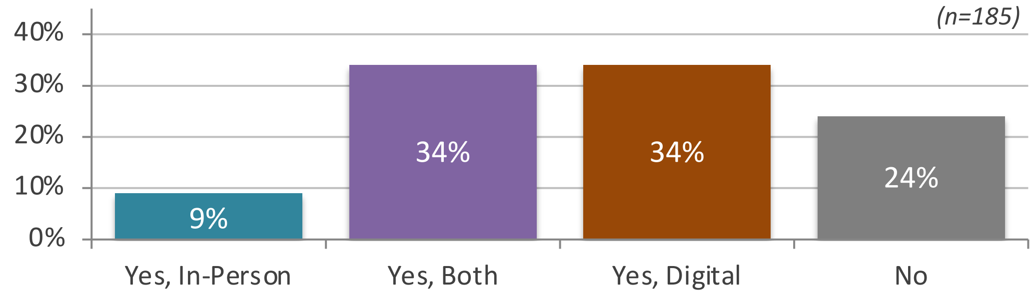
Organizations that **DO NOT operate a venue or facility**



ORGANIZATIONS

Recent Programming

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

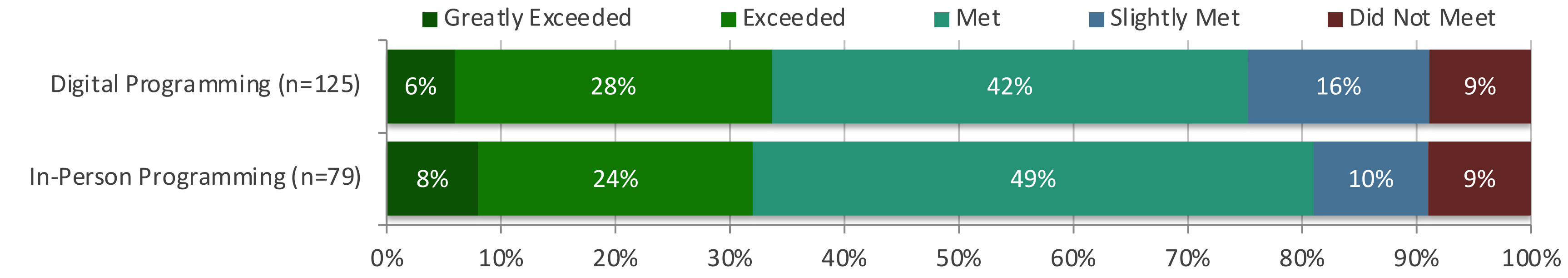


What We See

43% of organizations said they produced **in-person** programming between Aug-Oct, while **68%** produced **digital** programming.

Only **9%** (both **digital** and **in-person**) of respondents felt that their programming **did not meet** their expectations.

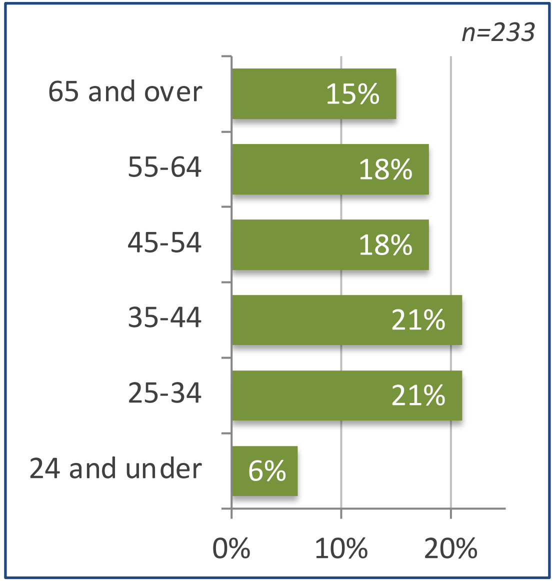
As a whole, to what degree did your **in-person** or **digital** programming meet your expectations?



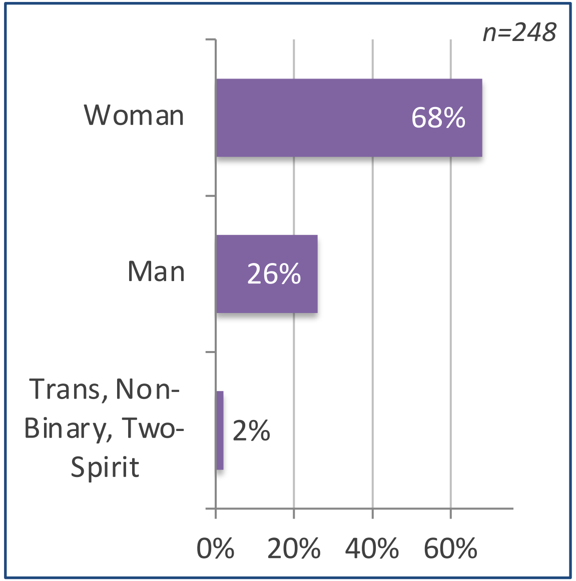
ARTISTS AND ARTS WORKERS

Demographics

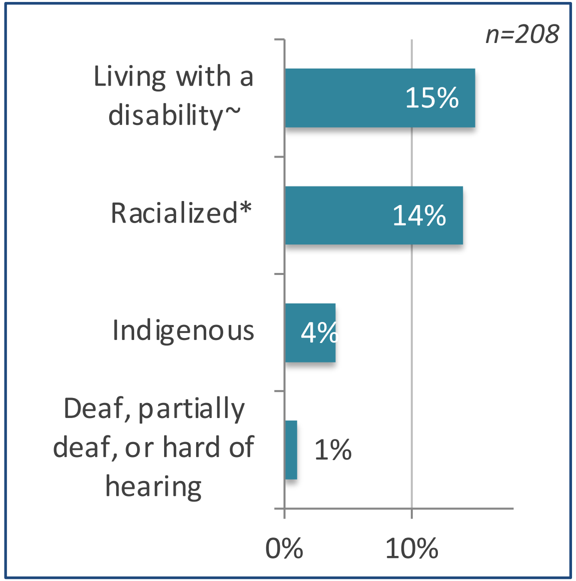
Age



Gender



Identify as...

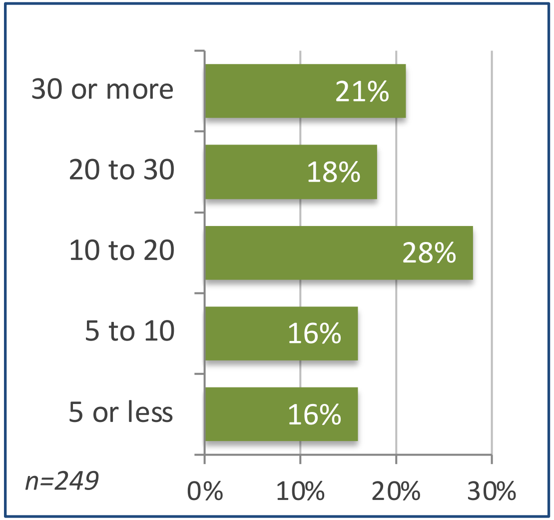


~Self identified as a person who has/is blind, visually impaired, physically impaired, mobility issues, learning disability, intellectually impaired, living with mental or chronic illness
**Self identified as person of African, Asian, Middle Eastern, or Latin American descent, or mixed heritage that includes at least one of these groups*

ARTISTS AND ARTS WORKERS

Sector Experience

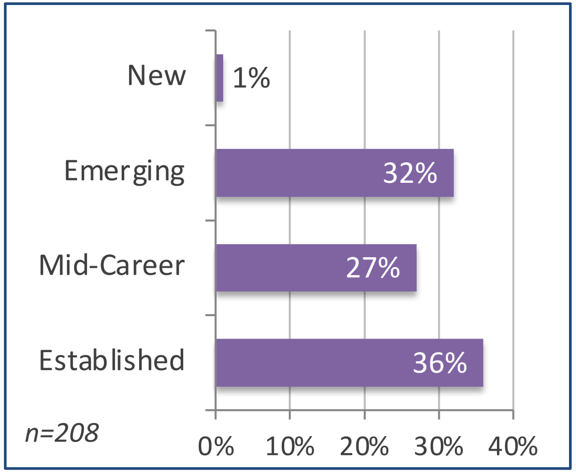
How many years have you worked in the arts and culture sector?



How would you identify your level of experience?

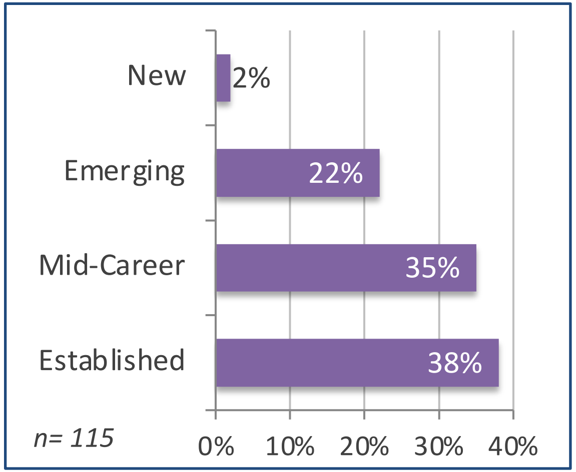
Artists

Level of Experience



Arts Workers

Level of Experience



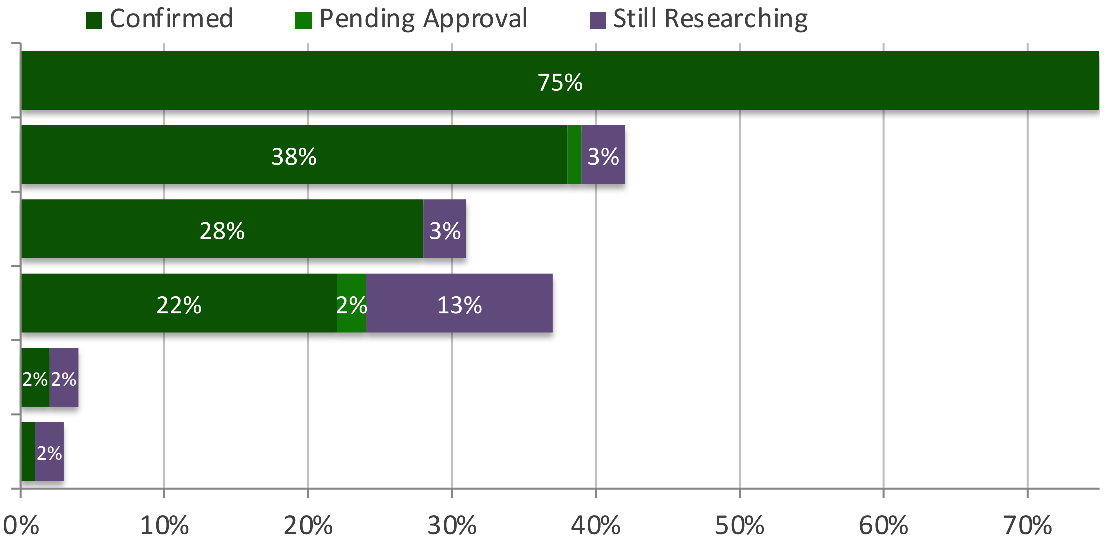
ARTISTS AND ARTS WORKERS

Government Support

What We See

CERB is the most accessed relief program for artists and arts workers with **75%** of respondents reporting they **confirmed** approval. All of the other programs were accessed **much less frequently**.

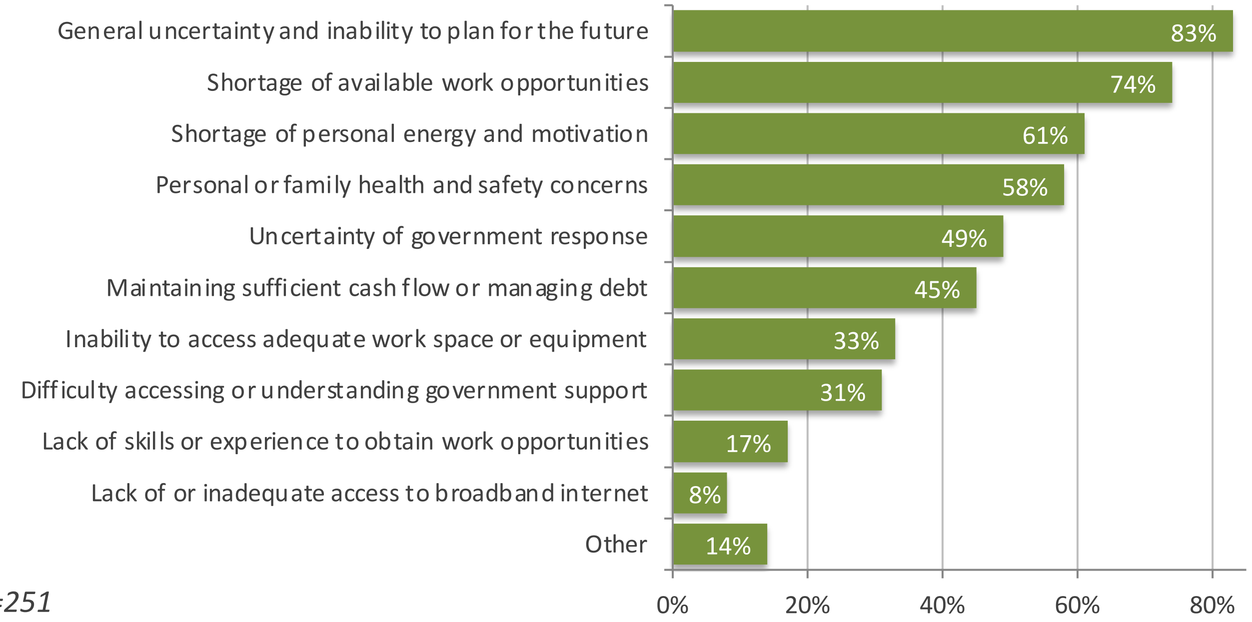
Which of the following relief supports have you already accessed or intend to access?



ARTISTS AND ARTS WORKERS

Obstacles

Over the last THREE MONTHS (Aug-Oct), which of the following are **OBSTACLES** you have faced?



n=251

What We See

Most individuals identified multiple obstacles including <u>general uncertainty and inability to plan for the future</u> (**83%**); <u>shortage of available work opportunities</u> **74%**); and <u>shortage of personal energy and motivation</u> (**61%**).

Other challenges include concerns about health and safety, government response, and financial worries.

Respondents could select more than one option.

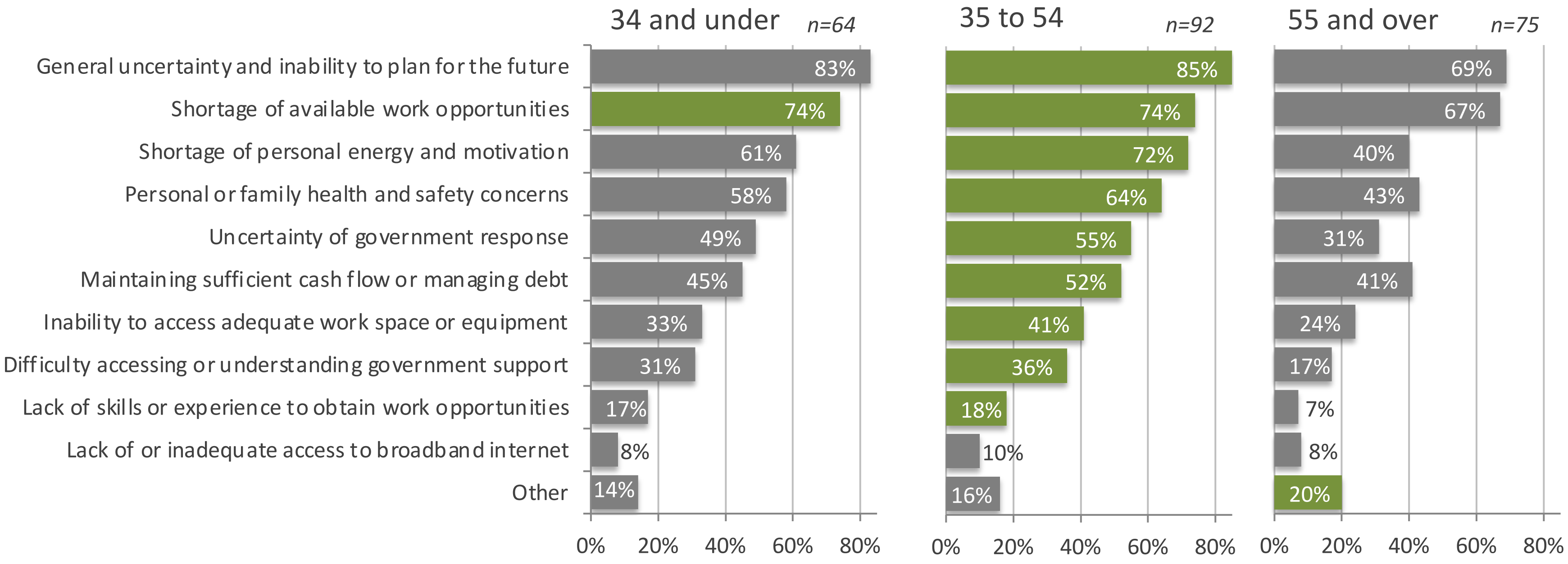
ARTISTS AND ARTS WORKERS

Obstacles by Age Range

What We See

Individuals aged <u>35-54</u> reported a **higher number of obstacles** in the last three months compared to other age ranges. **Fewer obstacles** were reported by individuals <u>55 and over</u>. Highlighted below is the age range with the highest percentage of responses for each obstacle.

Over the last THREE MONTHS (Aug-Oct), which of the following are **OBSTACLES** you have faced?



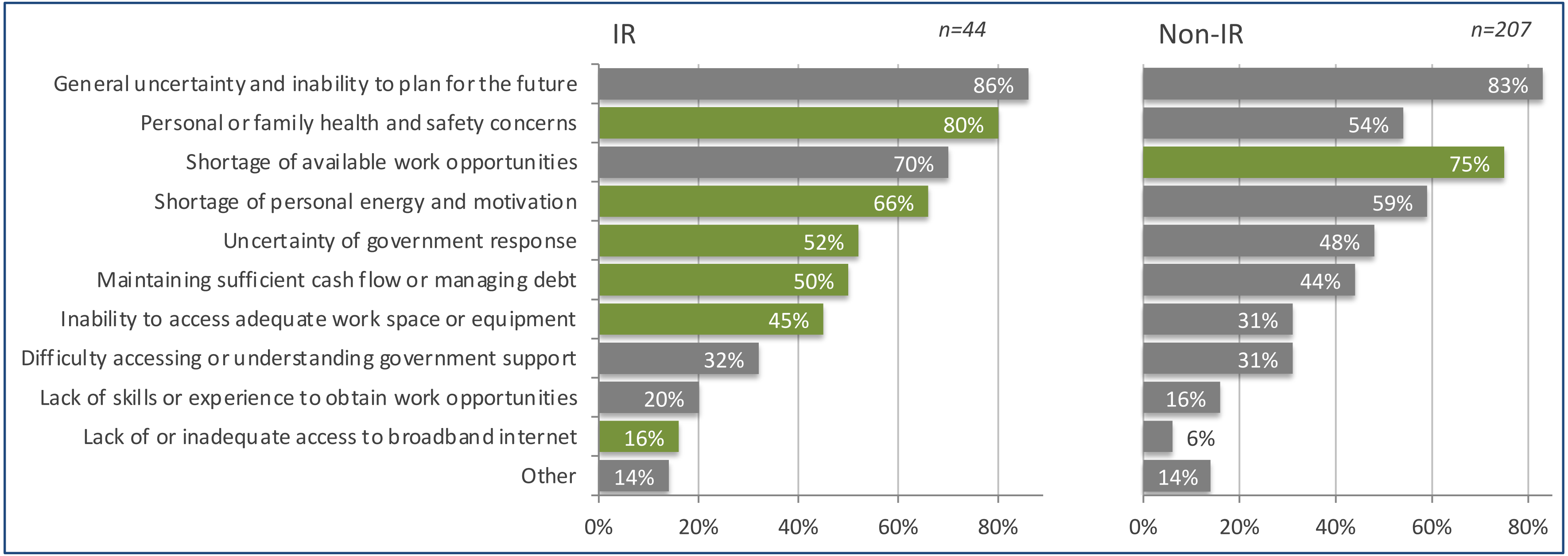
ARTISTS AND ARTS WORKERS

Obstacles by Indigenous and Racialized individuals

Over the last THREE MONTHS (Aug-Oct), which of the following are **OBSTACLES** you have faced?

What We See

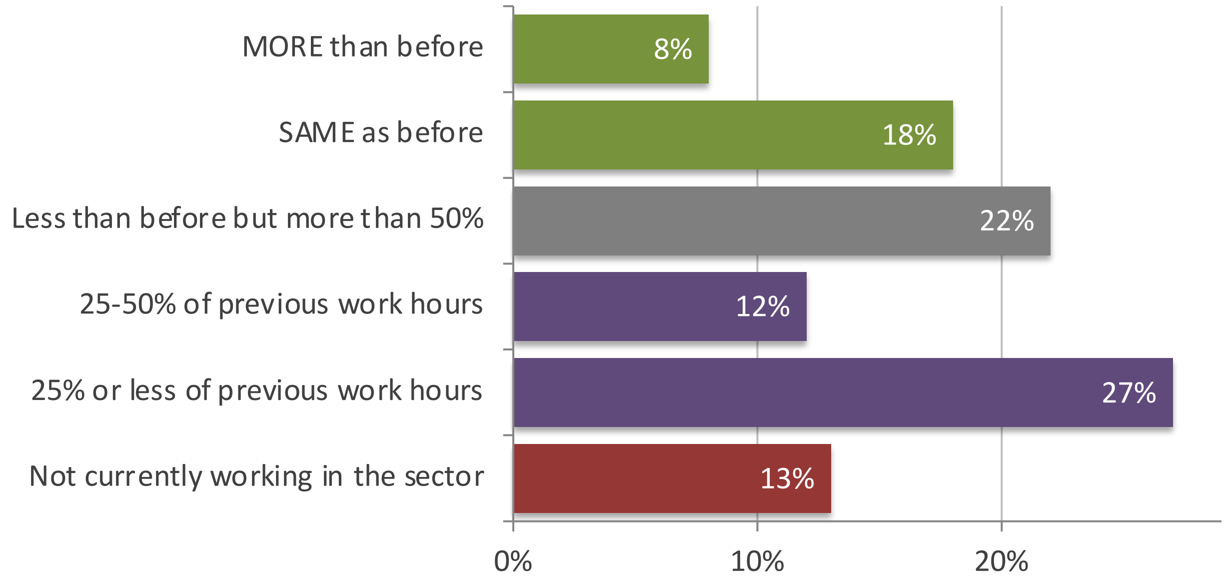
Indigenous and Racialized (IR) individuals reported a **higher number of obstacles** in the last three months compared to non-IR individuals. **80%** of IR respondents identified personal or family health and safety concerns, compared to **54%** of non-IR. Other obstacles disproportionately impacting IR respondents include shortage of personal energy and motivation, maintaining cash flow, and access to work space and equipment.



ARTISTS AND ARTS WORKERS

Hours of Work

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



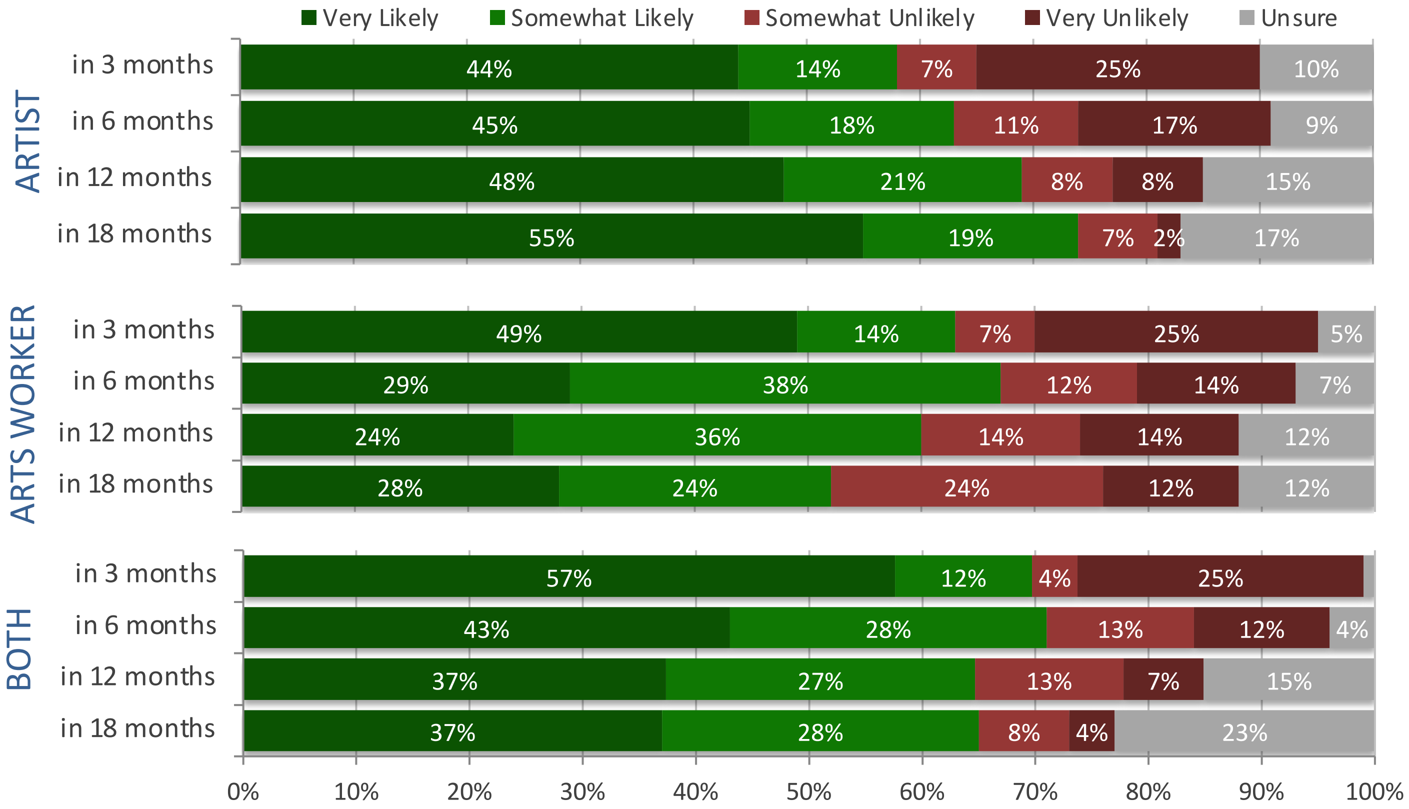
What We See

While **26%** of artists and arts workers have **maintained or increased** their work hours compared to pre-COVID,
13% are **not currently working in the sector**.

39% are working **fewer than half** of their pre-pandemic work hours in the sector.

ARTISTS AND ARTS WORKERS

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



What We See

An **increasing number** of individuals who identify solely as an **artist** expect to continue working in the arts and culture sector over time, with **74%** somewhat or very **likely** to be working in the arts in **18 months**.

Those who identify solely as an **arts worker** have declining confidence with **36%** feeling somewhat or very **unlikely** to remain in the arts in **18 months**, while **52%** feel somewhat or very **likely** to remain.

Confidence for those who identify as **both** an artist and arts worker is more **consistent over time**.

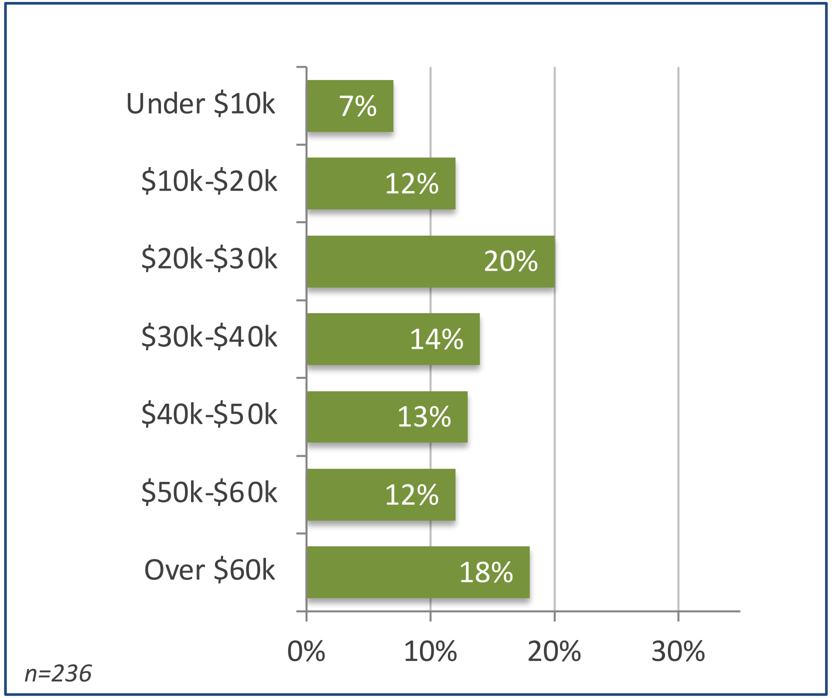
ARTISTS AND ARTS WORKERS

2020 Annual Income

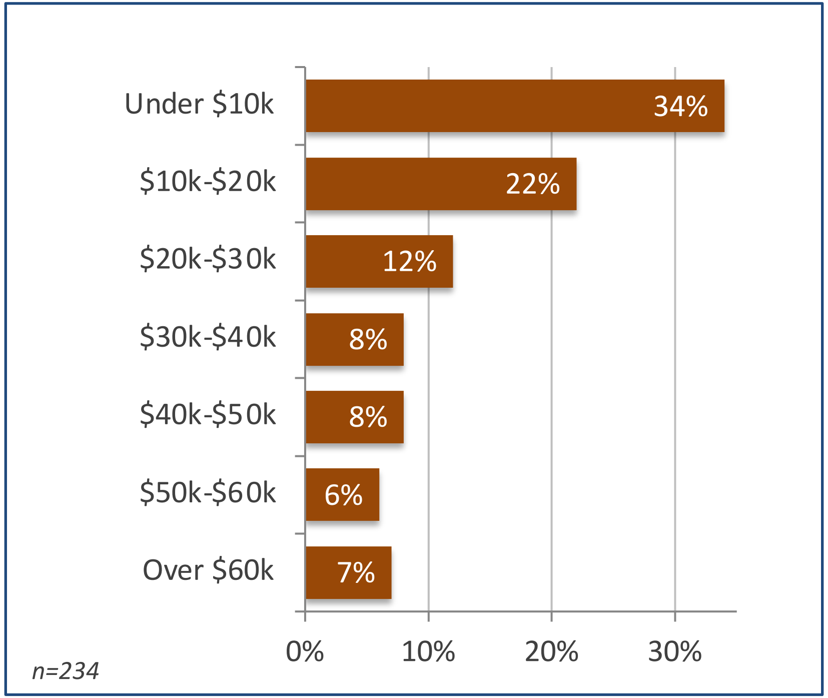
What We See

19% of artists and arts workers **originally projected** to earn <u>less than $20K</u> this year from all sources of income, but **now 56%** expect to fall within that income bracket.

Originally Projected: Pre-COVID

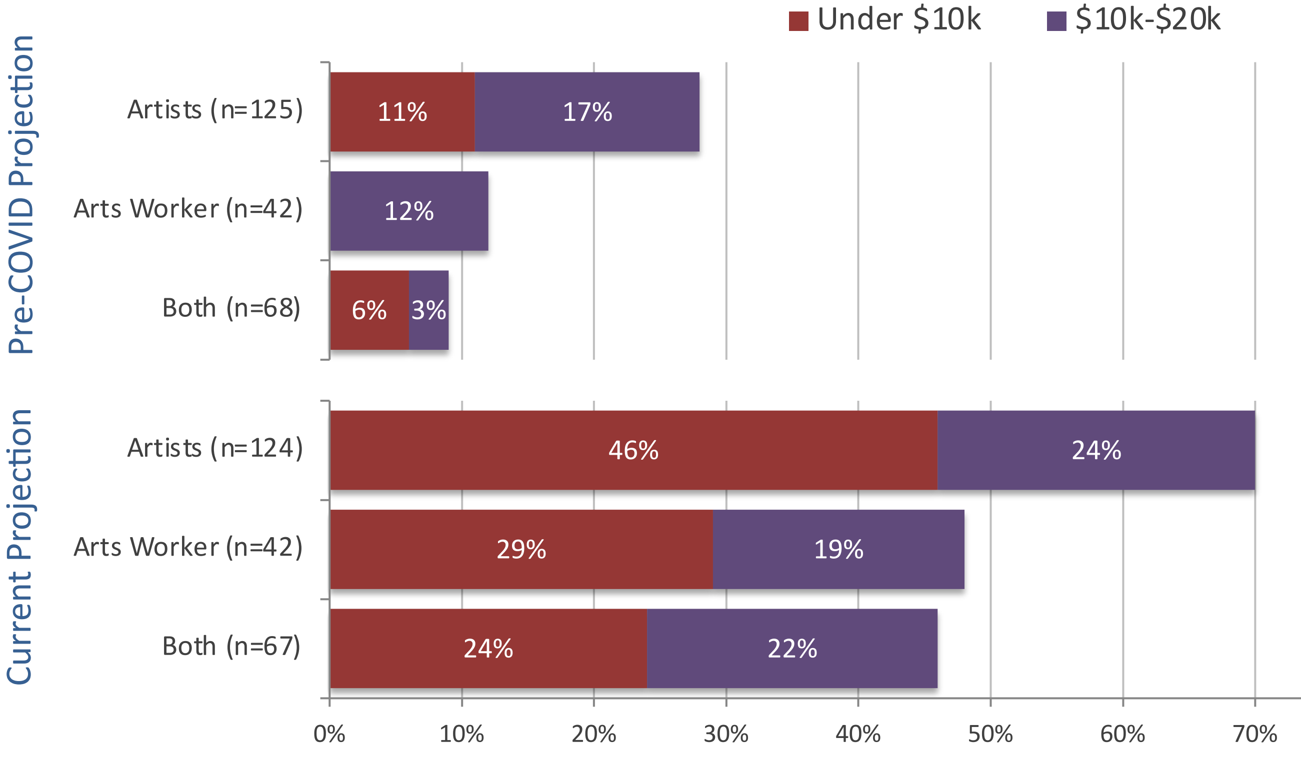


Projected: Current



ARTISTS AND ARTS WORKERS

2020 Annual Income, by Type of Worker



What We See

This represents respondents who expect this year's income to be less than $20k, broken down by those who identify solely as an **artist**, solely as an **arts worker**, and those who identify as **both** and artist and arts worker.

70% of **artists** expect this year's income from all sources to be less than $20k, 22-points higher than **arts workers** (**48%**) and 24-points higher those who are **both** an artist and arts worker (**46%**).

The highest percentage **increase** between their pre-COVID and current projections of under $10k are also **artists** with a **35-point increase** from **11%** to **46%**.

ARTISTS AND ARTS WORKERS

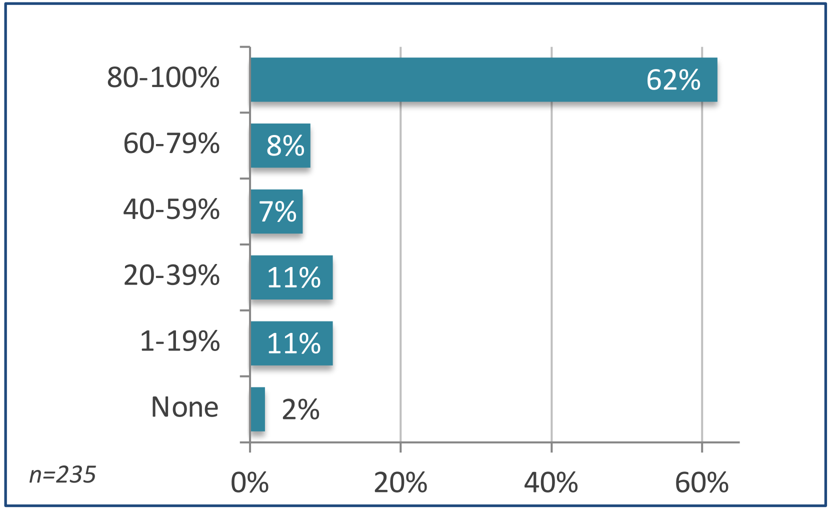
Percentage of Annual Income from Arts & Culture Sector

What We See

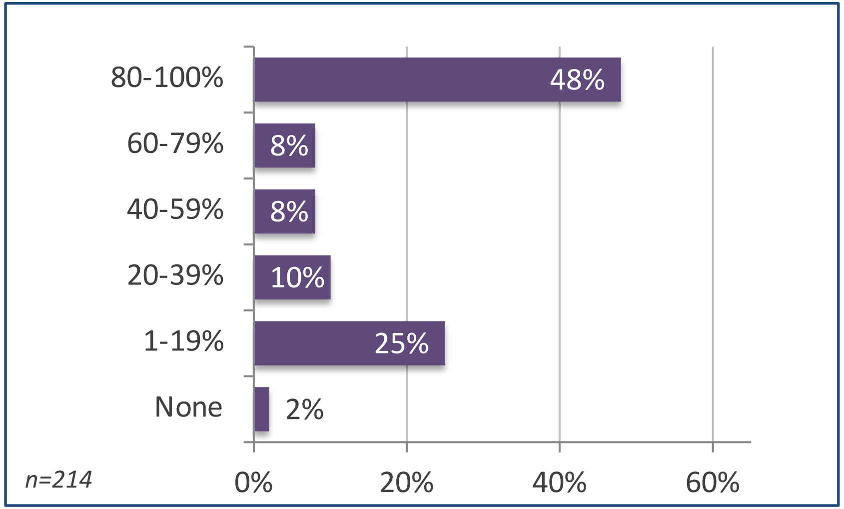
62% of respondents originally projected to earn more than **80%** of their income from the arts and culture sector. As a result of the pandemic, income from the sector will be **reduced**.

What percentage of your annual income was expected to, or will, come from the arts and culture sector?

Originally Projected: Pre-COVID



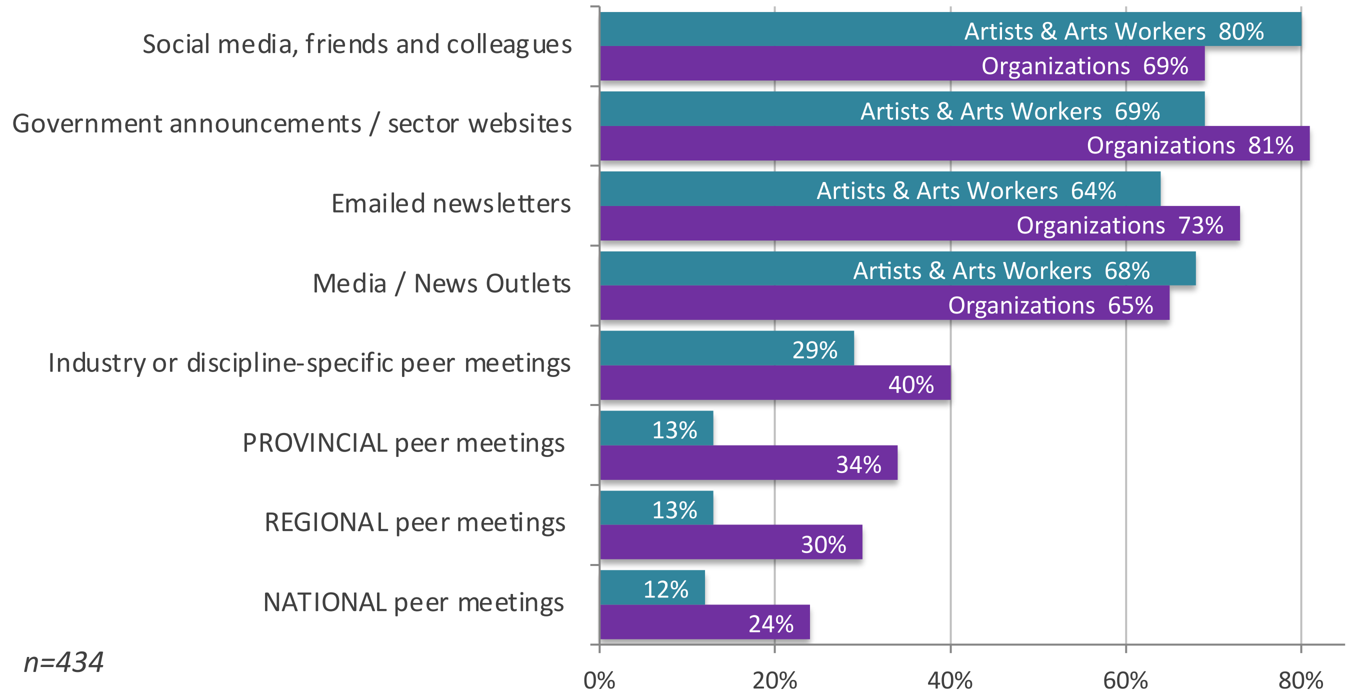
Projected: Current



ALL RESPONDENTS

Staying Informed

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



n=434

What We See

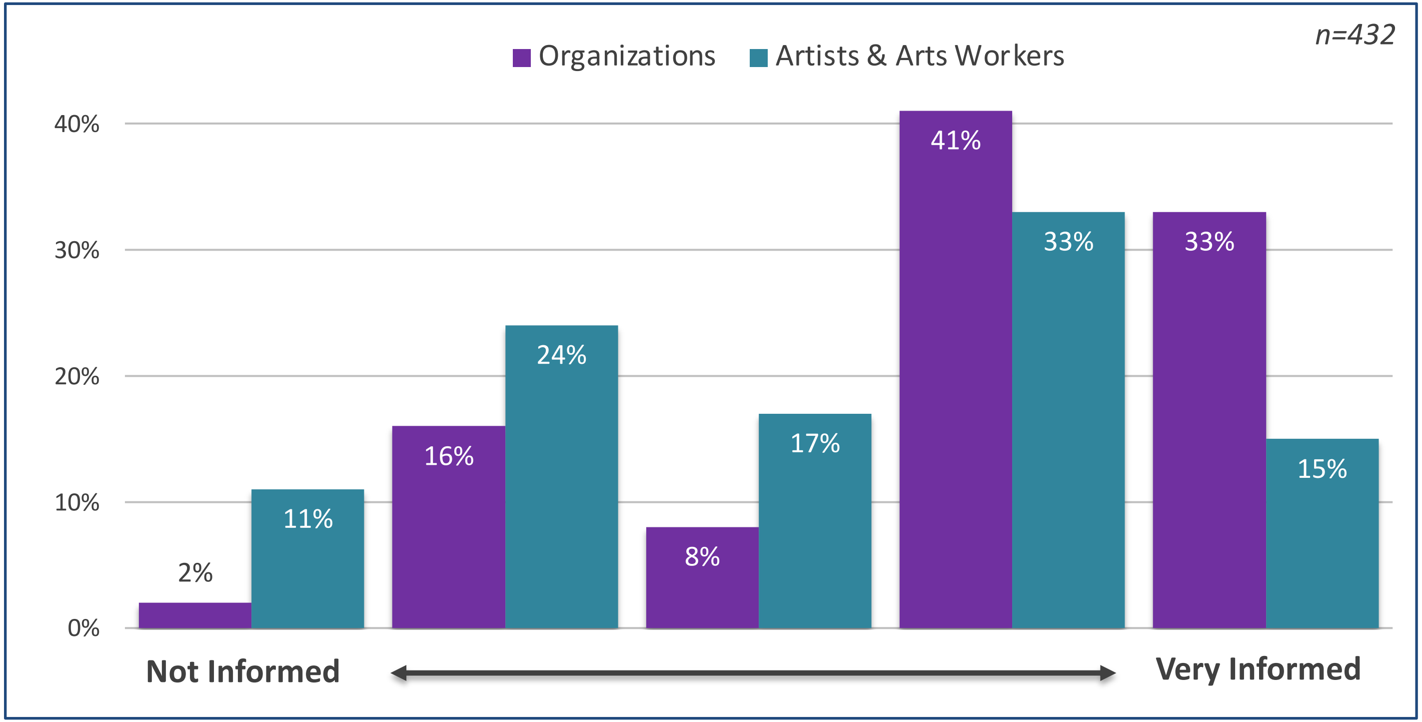
The **majority** of respondents stay informed about sector and government updates through social media, government websites, newsletters, and news outlets.

Representatives of **organizations** are **more likely** to participate in peer-based meetings than **artists and arts workers**.

ALL RESPONDENTS

Staying Informed

Do you feel sufficiently informed about sector and government updates?



What We See

On average, **organization** respondents feel **more informed** about sector and government updates, while **artists and arts workers** feel **less informed**.

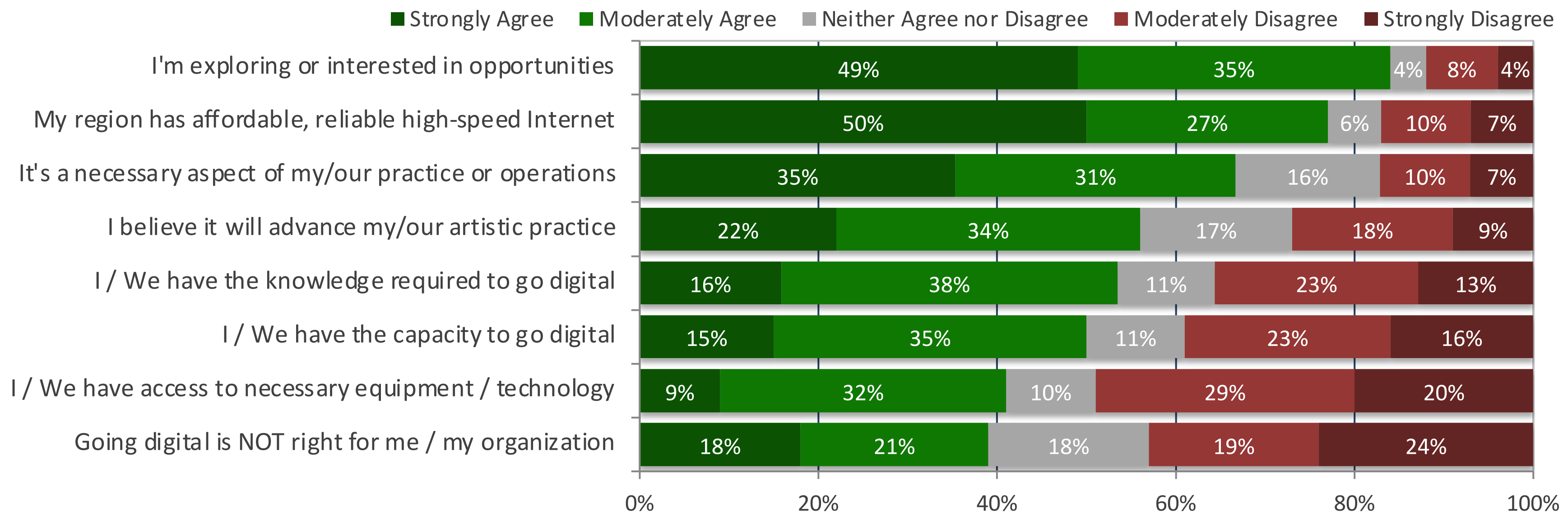
ALL RESPONDENTS

Digitizing Programming

What We See

The **vast majority** of respondents **agree** that going digital is of interest to them (**84%**), is necessary to their work (**66%**), and believe it will advance their artistic practice (**56%**). Many respondents identified that they **don't have** access to the necessary technology to make the shift (**49%**).

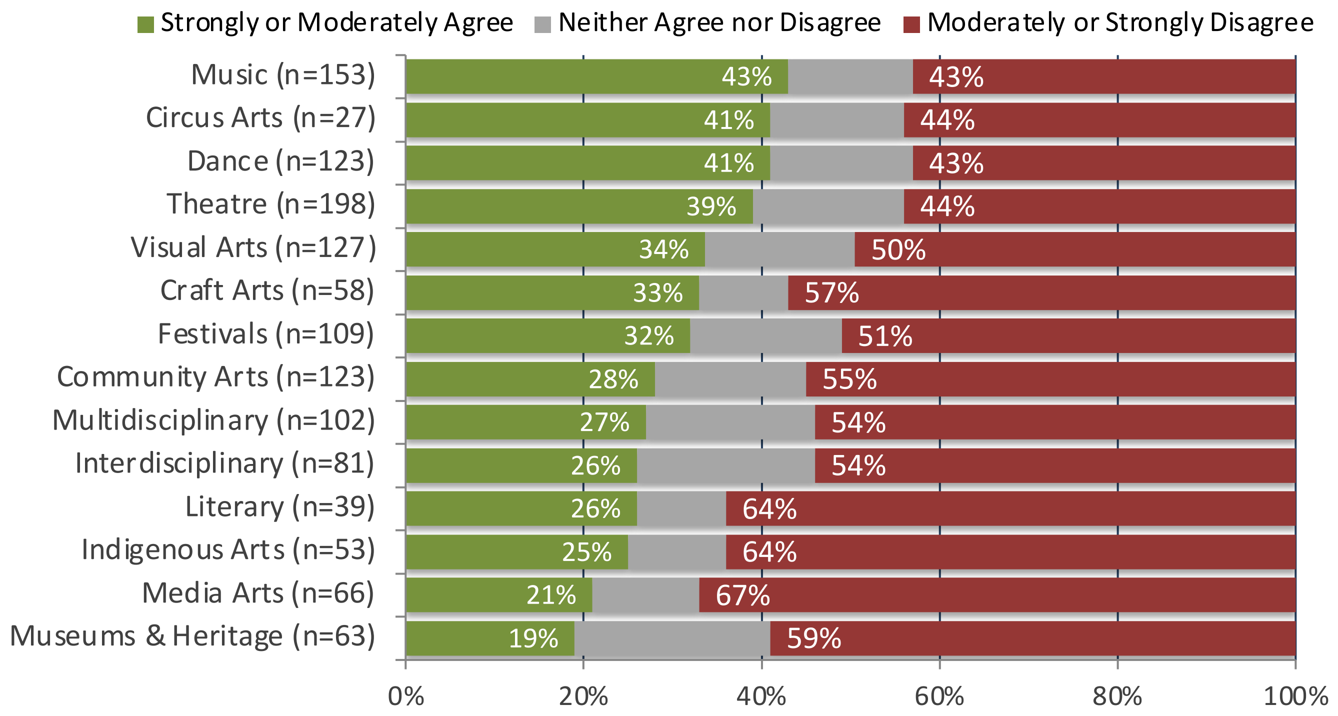
How do each of these statements reflect your thoughts about pivoting to digital programming and practices?



ALL RESPONDENTS

Digitizing Programming by Discipline

Statement: “Going digital is **NOT** right for me / my organization”



What We See

The top four disciplines that **strongly or moderately agreed** to the statement “Going digital is NOT right for me / my organization” were all within the performing arts – Music (**43%**), Circus Arts (**41%**), Dance (**41%**), and Theatre (**39%**).

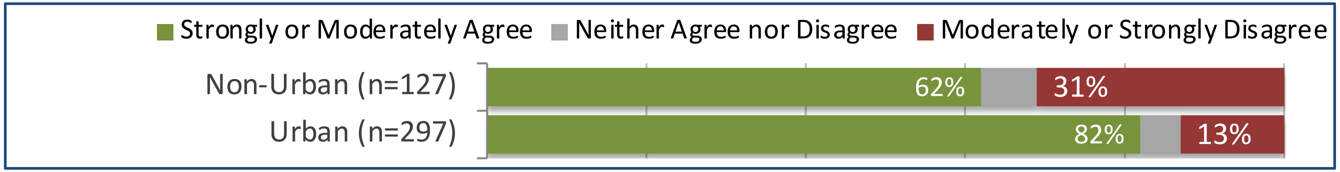
Museums & Heritage (**19%**) and Media Arts (**21%**) had the smallest percentage **agree** to the statement.

ALL RESPONDENTS

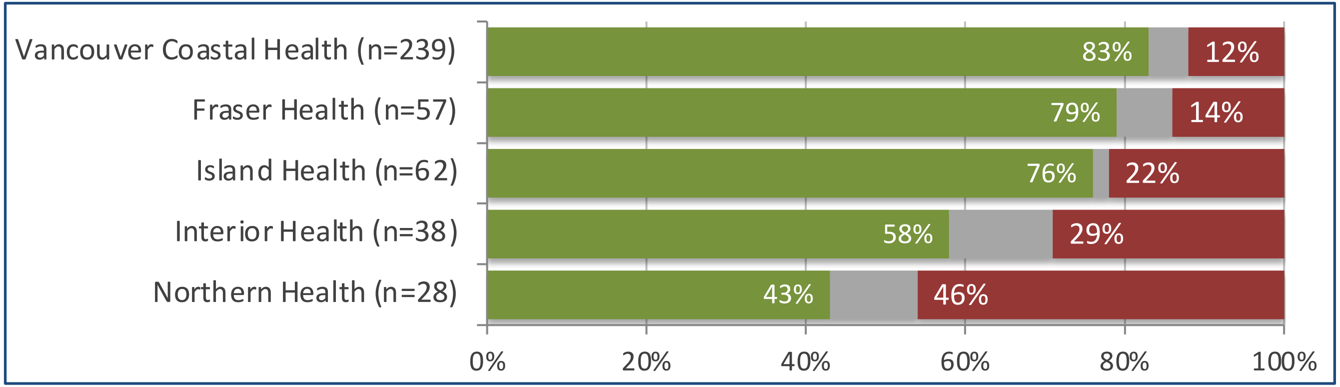
Digitizing Programming by Region

Statement: "Affordable, reliable high-speed Internet is available in my region"

Urban vs Non-Urban



Based on Health Authority Region



What We See

More respondents in non-urban and northern communities feel they don't have affordable, reliable high speed internet in their region.

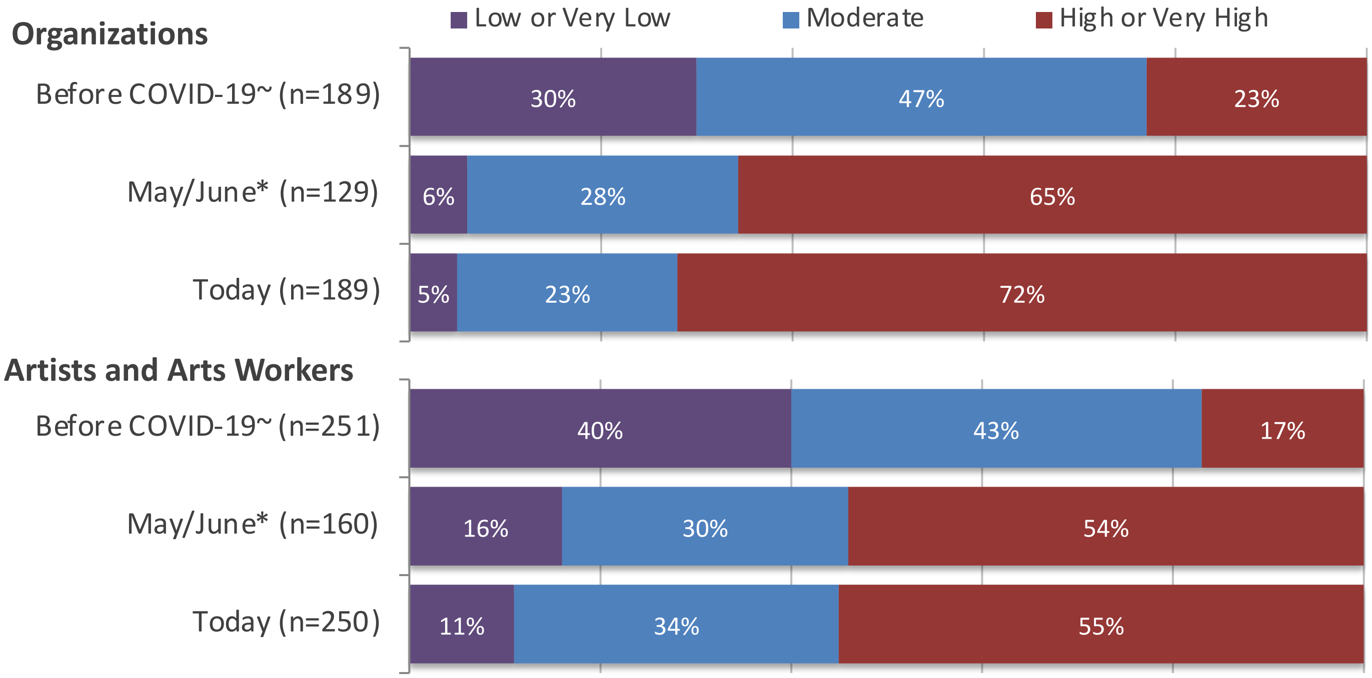
31% of respondents in non-urban communities **moderately or strongly disagree** with the statement, compared to urban (13%).

46% of respondents in Northern Health Authority region **moderately or strongly disagree**, compared to **12%** in VCH and **14%** in Fraser Health regions.

ALL RESPONDENTS

Stress and Anxiety

How would you describe your typical day-to-day stress and anxiety level?



What We See

Stress and anxiety for both organizations and individuals have **increased** over time. More organization respondents, compared to individuals, have reported **high or very high levels** of stress and anxiety.

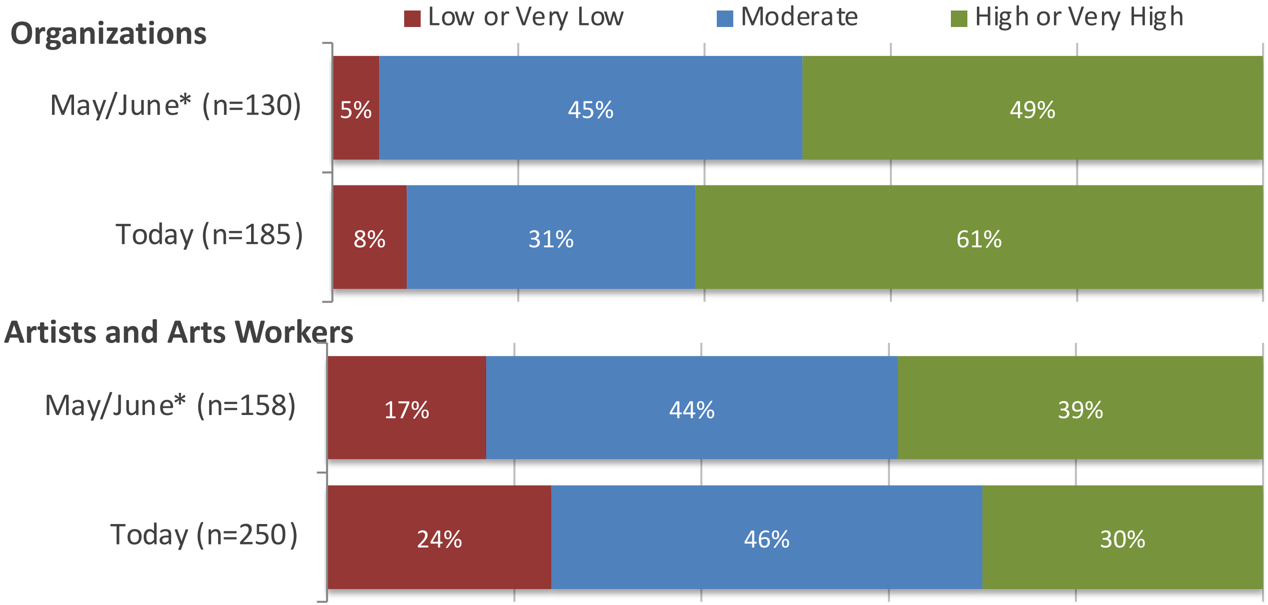
~Before COVID-19 data is based on respondents' self-assessment at the time of completing this survey.

**May/June data represents previous survey responses from May 1 to June 30.*

ALL RESPONDENTS

Self Optimism

How optimistic are you that **your organization** or **your arts work/arts practice** will recover from COVID-19?



What We See

A higher percentage of organizations reported **high or very high** (**61%**) level of optimism, compared to those that reported in **May/June** (**49%**).

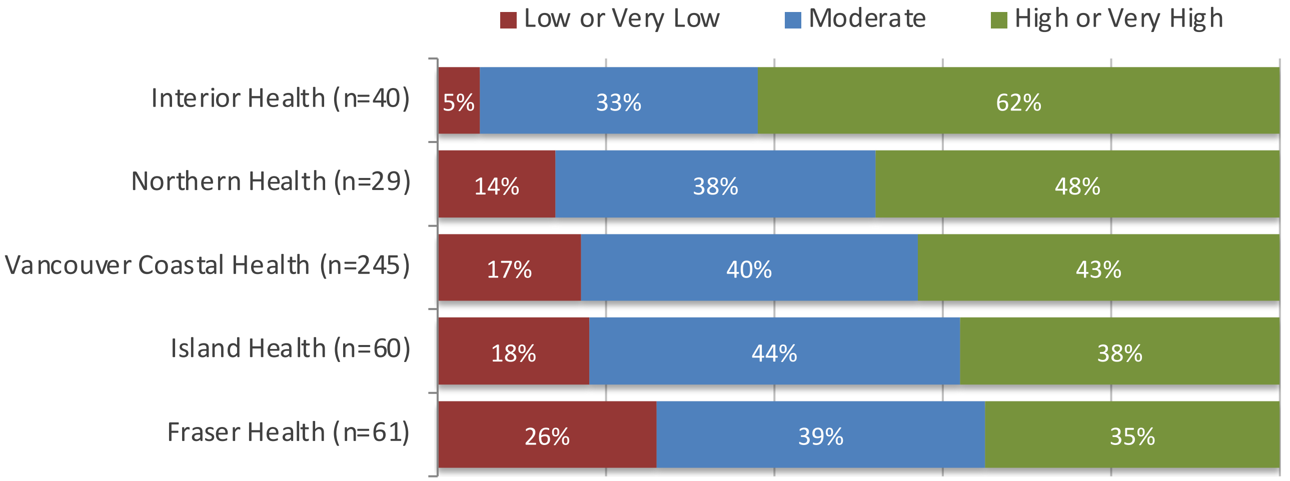
Compared to **May/June**, artists and arts workers are **less optimistic** about the recovery of their arts work and arts practice; **24%** report **low or very low** optimism **now** compared to **May/June** (**17%**), and **30%** report **high or very high** optimism **now** compared to **May/June** (**39%**).

**May/June data represents previous survey responses from May 1 to June 30.*

ALL RESPONDENTS

<u>Self</u> Optimism by Health Authority Region

How optimistic are you that **your organization** or **your arts work/arts practice** will recover from COVID-19?



What We See

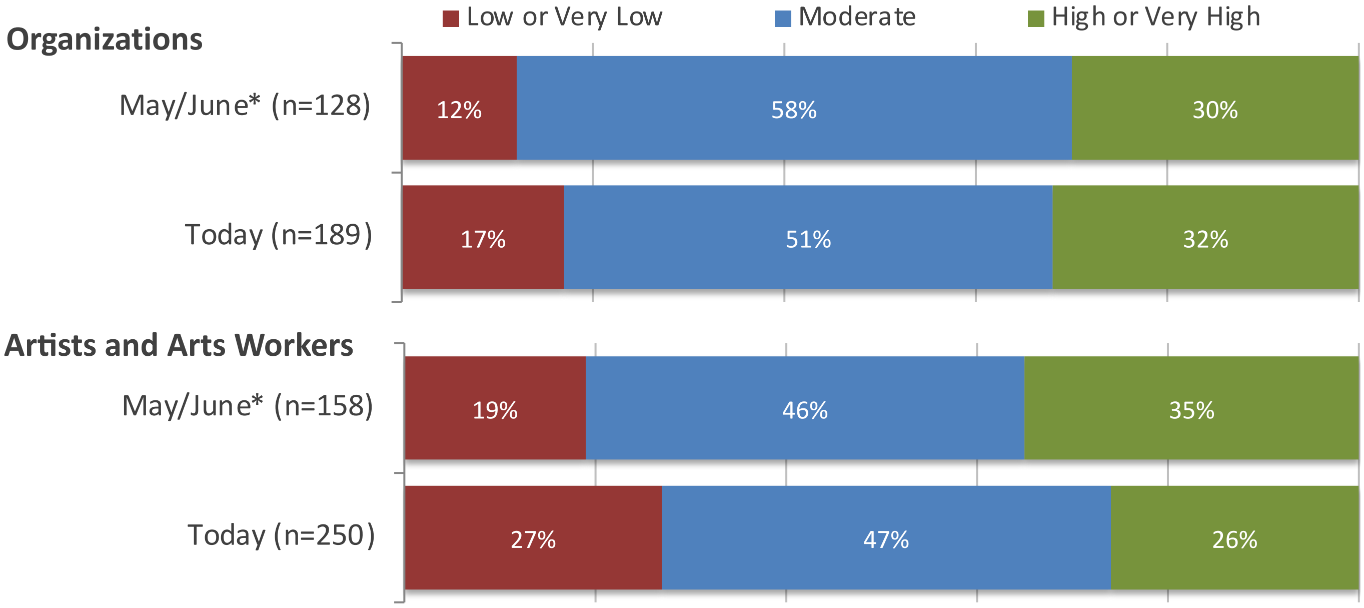
Respondents within the Interior Health Authority region are the most optimistic about the recovery of their organization or arts work, with **62%** having **high or very high** level of optimism, and **5% low or very low**.

Respondents within Fraser Health are the least optimistic with **35% having high or very high** level of optimism, and **26% low or very low**.

ALL RESPONDENTS

Sector Optimism

How optimistic are you that the **arts and culture sector across B.C.** will recover from COVID-19?



What We See

Overall, both organizations and individuals are **less optimistic** about B.C.'s arts and culture sector's recovery **today** compared to in **May/June**.

For organizations, **low and very low** optimism increased five points, from **12%** to **17%**, while the percentage of individuals identifying **low and very low** optimism increased eight points, from **19%** to **27%**.

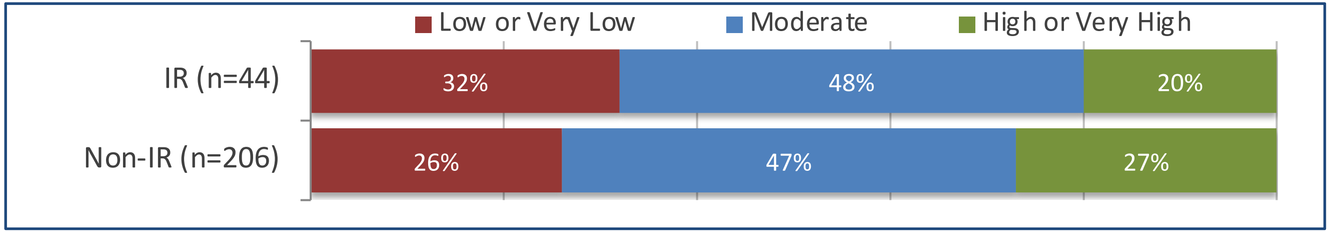
**May/June data represents previous survey responses from May 1 to June 30.*

ARTISTS AND ARTS WORKERS

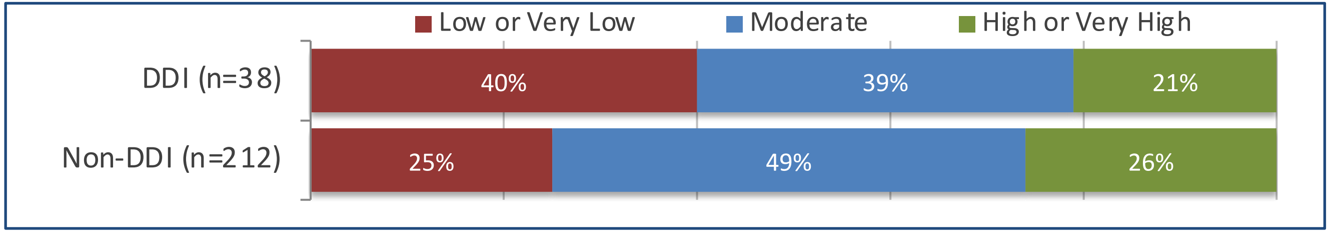
Sector Optimism by Identities

How optimistic are you that the **arts and culture sector across B.C.** will recover from COVID-19?

Indigenous and Racialized (IR)~



Deaf, Disabled, Impaired (DDI)*



What We See

Both IR and DDI individuals were **less optimistic** about the arts and culture sector's recovery, when compared to their non-IR and non-DDI colleagues.

~Self-identified as First Nations, Inuit, or Métis; and/or Person of African, Asian, Middle Eastern, or Latin American descent, or mixed heritage that includes at least one of these groups.

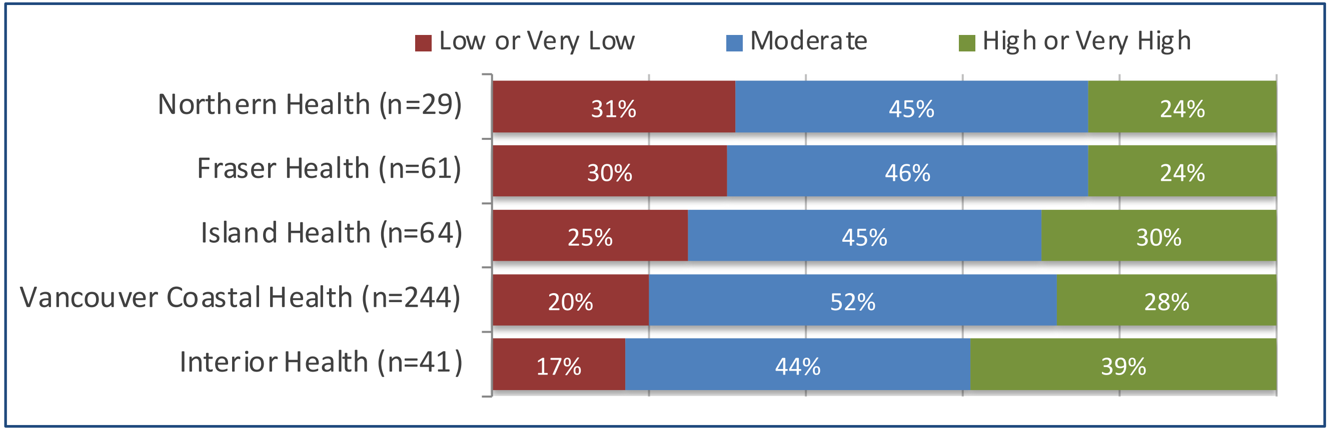
**Self-identified as a person who is Deaf, partially deaf, or hard of hearing; and/or who has/is blind, visually impaired, physically impaired, mobility issues, learning disability, intellectually impaired, living with mental or chronic illness.*

ARTISTS AND ARTS WORKERS

<u>Sector</u> Optimism by Region

How optimistic are you that the **arts and culture sector across B.C.** will recover from COVID-19?

Based on Health Authority Region



What We See

Each of the <u>Interior</u>, <u>Vancouver Coastal</u>, and <u>Island Health</u> regions have a **higher percentage** of **high or very high** optimism compared to their region's **low or very low** respondents.

<u>Northern</u> and <u>Fraser Health</u> regions have a **higher percentage** of **low or very low** optimism compared to their region's **high or very high** respondents.