British Columbia Arts & Culture Sector COVID-19 Impact Report Fall 2021

November 30, 2021

Produced by

GVPTA Greater Vancouver Professional Theatre Alliance

GVPTA acknowledges and respects 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 continues to have a profound effect 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 has been issued province-wide, and across artistic disciplines. Four iterations of the survey have been issued since March, 2020.

This report includes data collected between November 9 and 25, 2021 through the COVID-19 B.C. Arts & Culture Sector Impact Survey.

Previous COVID-19 Impact Reports can be found online at www.gvpta.ca.

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

Considerations:

- We acknowledge that the survey was only conducted online and in English. 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 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.

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 previous 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.
- Responses to previous impact survey were used to measure changes to the same questions over time, and are noted as "December" or "April".

Further Analysis:

If you are looking for other segmented information, by discipline, region, demographics, or others, email Kenji Maeda at kenji@gvpta.ca to inquire.

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Highlights

About the Respondents

- Of the **373 respondents**, **55%** were individual **artists & arts workers**, and the other **45%** responded on behalf of an **organization**. Of the **205** responding as individuals, **51%** identified solely as an **artist**, **17%** solely an **arts worker**, and **32%** as **both** artist and arts worker.
- **55%** of the respondents were based in the **Vancouver Coastal Health** region, **15%** from each **Island Health** and **Fraser Health**, **12%** based in **Interior Health** region, and **3%** from **Northern Health**.
- The top five disciplines represented by respondents included: **Theatre** (**49%**), **Music** (**29%**), **Visual Arts** (**27%**), **Community Arts** (**27%**), and **Multidisciplinary** (**20%**).

Individuals

- **One-third (36%)** of individuals are working more in the arts now compared to six months ago, however **more than half (56%)** still work less than pre-pandemic levels. **9%** are not working in the sector.
- If **individuals** had access to an unrestricted grant today, the top three priority areas selected by the most respondents include the costs to <u>create or develop their art</u>, <u>professional development for their work in the arts</u>, and to cover <u>fixed costs</u> (eg. rent, hydro).
- While **artists** have a consistent level of expectation working in the sector over the next two years, we see a dramatic decline in confidence with **arts workers**, which may result in a labour shortage.
- While <u>increased stress or shortage of energy</u> and <u>general uncertainty</u> continue to be the **highest reported obstacles** recently experienced by individuals (similar to the April report), when considering **anticipated obstacles** over the coming months, <u>increased stress</u> and <u>maintaining sufficient cash flow</u> are reported most frequently.
- **Over three-quarters** report <u>vaccinations</u> as a condition to help them feel safe in most work spaces. The nature of the work and space affects which other conditions (eg. masking, distancing) they would prioritize.

Organizations

- **More than one-quarter** of organizations shared their financial position as being **somewhat or very unstable.**
- **6%** of organizations that operate a facility indicate possible closure within 12 months. **2%** have already closed or are in process.
- Compared to the previous four months, organizations expect a **net increase** in the <u>number of staff, artists, contracts, and hours worked</u> **over the next four months**.
- The most selected obstacles recently faced by **organizations** include: reduced sales income due to fewer patrons (**76%**), <u>government regulations related to public health orders</u> (**76%**); and <u>uncertainty of government response to plan effectively</u> (**74%**).

Highlights continued

Organizations continued

- Although planning timelines were dramatically shortened due to the pandemic (**45%** planned at least one year in advance pre-pandemic, which dropped to **10%** within the last year), **29%** of organizations say they will have a longer planning cycle in 2023 compared to 2019.
- If guidelines allow, **34%** of respondents expect to return to 100% capacity by February. **38%** don't expect to return to full capacity until spring/summer of 2022. And **27%** say it's too difficult to predict.
- If **organizations** had access to an unrestricted grant today, the top priority for **59%** of respondents is to invest in creating and presenting arts programming.

Extended Health Benefits

- **43%** of organizations offer extended health benefits to at least some of their employees, and **51%** offer paid sick days.
- **57%** of individuals have access to an extended health benefits plan; **less than two-thirds** indicate having access to mental health support.

Vaccines

- The majority (**75%-85%**) of respondents say the BC Proof of Vaccine program and BC Vaccine Card are positive for arts organizations, individuals, and the sector.
- **60%** of organizations have an internal testing or vaccine policy in place, and of those, **84%** say it's had a positive impact on their organization.

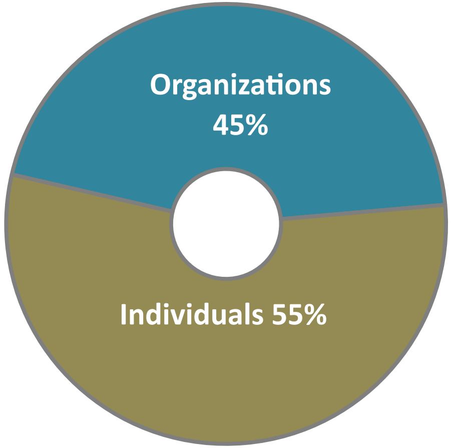
Stress, Anxiety, and Optimism

- Stress and anxiety levels for both organizations and individuals continue to be high, and have had no significant change compared to the April report.
- Overall optimism that the arts and culture sector will recover from the impact of COVID-19 has increased compared to the April 2021 report, with nearly all organizations (**97%**) and the majority of individuals (**84%**) expressing confidence.
- Compared to April, self optimism about recovery from effects of the pandemic by organizations declined slightly and stayed the same for individuals.

ALL RESPONDENTS

The Respondents: Organization vs Individuals

Of the 373 respondents, **55%** were **Individuals**, and the other **45%** responded on behalf of an **Organization**.



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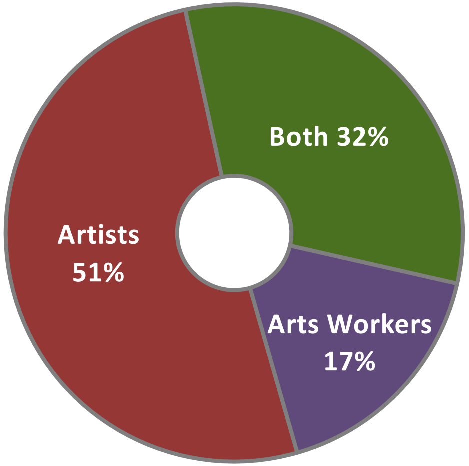
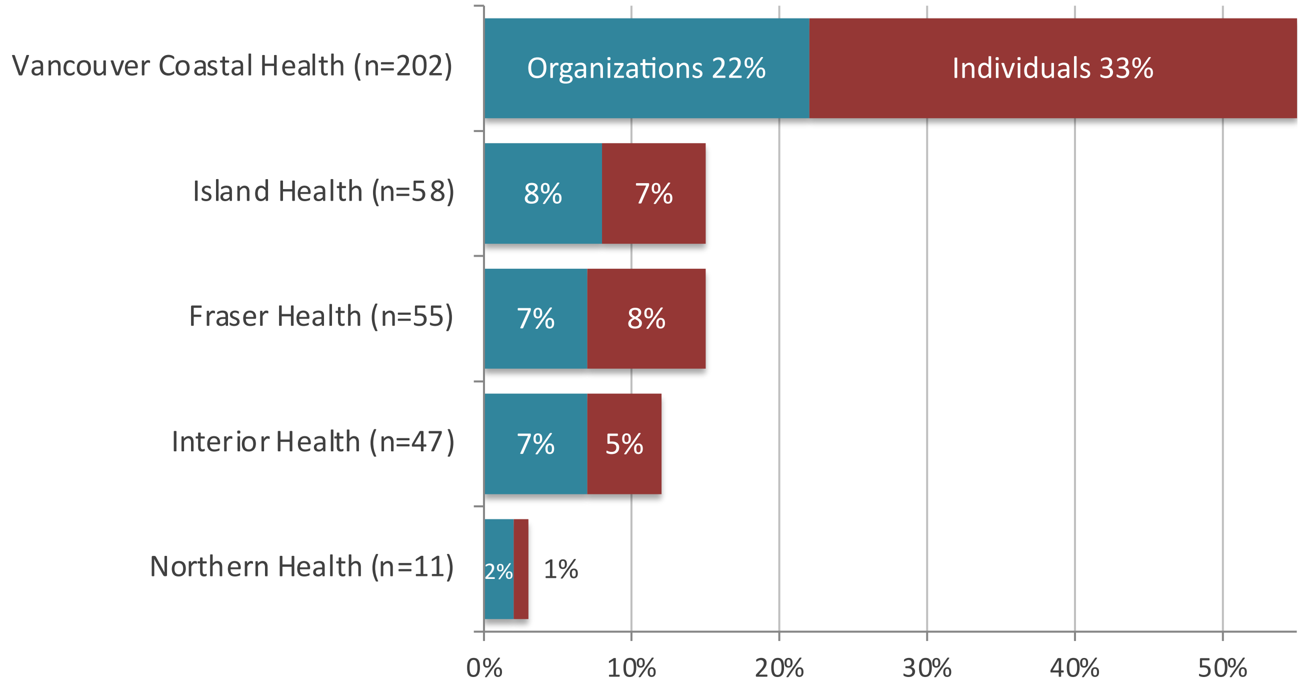
Of the 205 responding Individuals, **51%** identified as solely an **Artist**, **17%** as solely an **Arts Worker**, and **32%** as **Both** an Artist & Arts Worker.



n=205

ALL RESPONDENTS

The Respondents: Percentage of Respondents by Health Authority Region



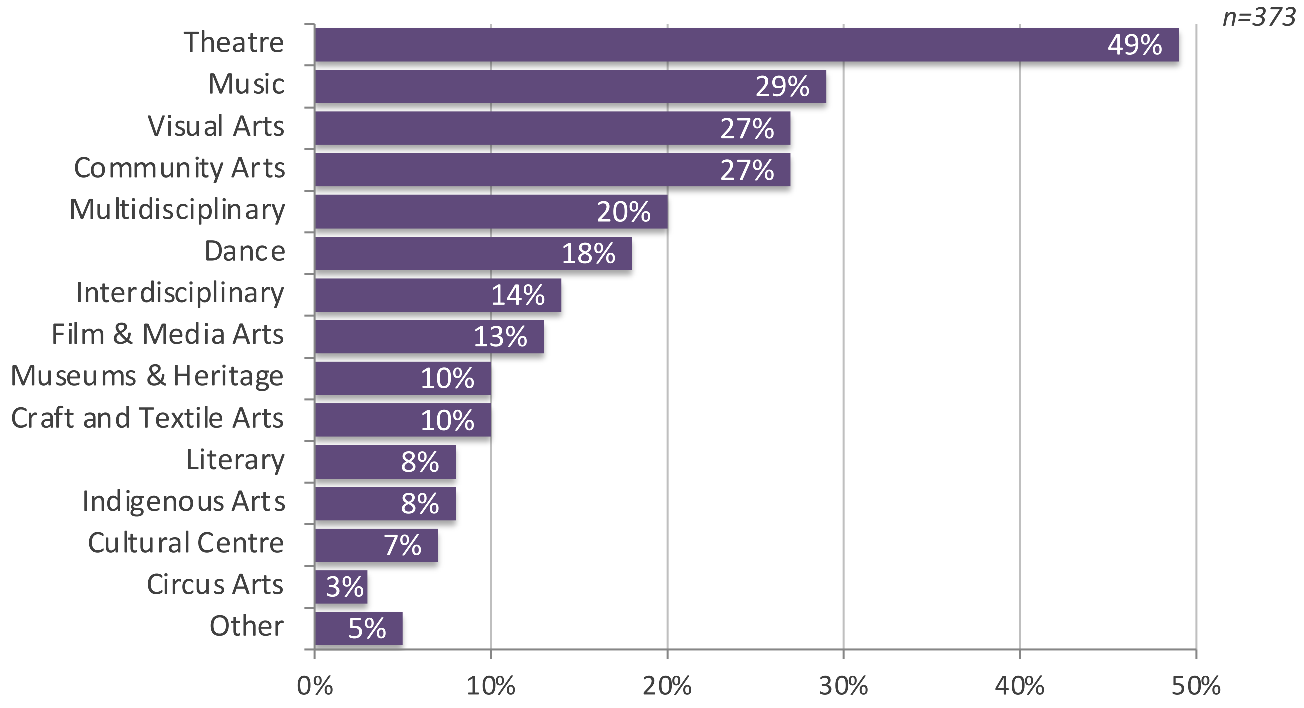
What We See

Responses from within all Health Authority regions were received.

55% of the respondents are based within the **Vancouver Coastal Health** catchment area.

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 represented include: **Theatre** (**49%**), **Music** (**29%**), **Visual Arts** (**27%**), **Community Arts** (**27%**), and **Multidisciplinary** (**20%**)

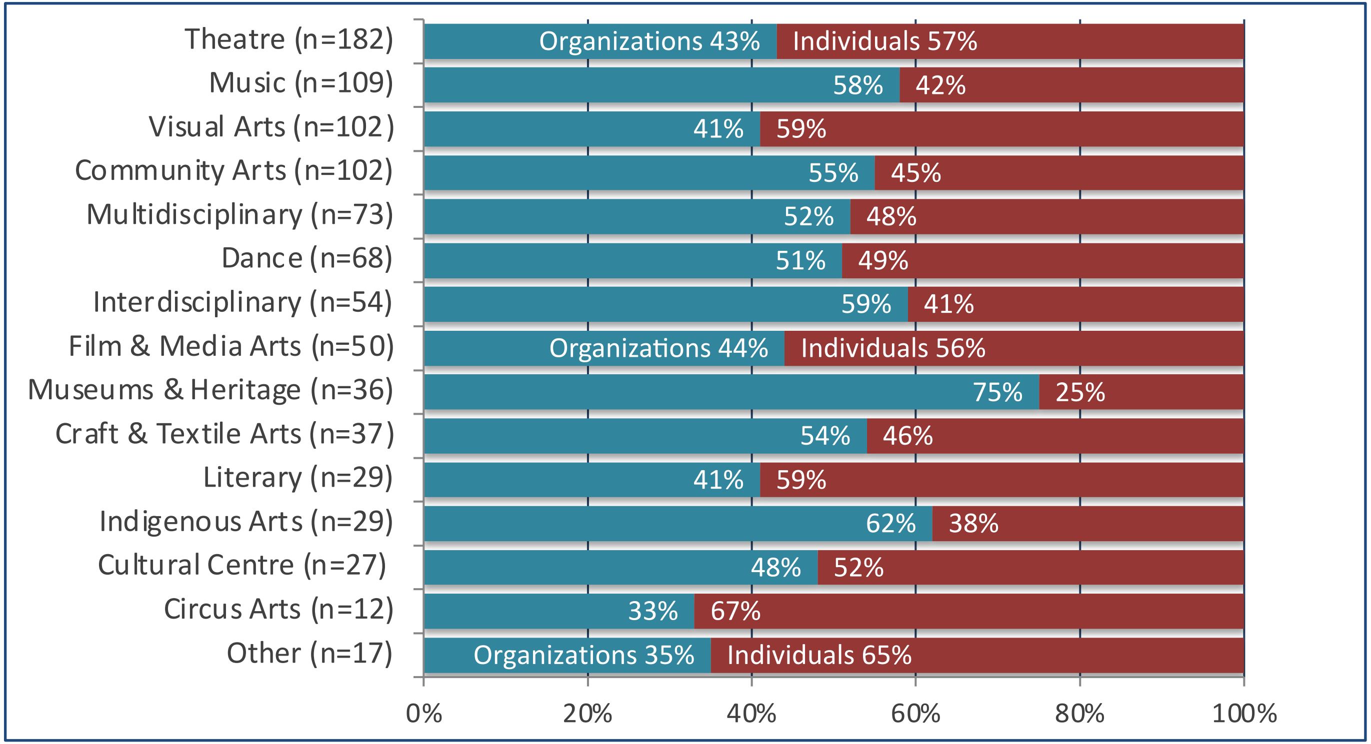
Of those who selected "Other" common responses included: Comedy, Drag, Disability Arts, and non-traditional definition of arts were identified.

Respondents could select more than one discipline.

Question:
Which discipline(s) do you primarily practice, work in, work with, or represent?

ALL RESPONDENTS

The Respondents: For **Each Discipline**, Percentage of Organizations vs Individuals



What We See

Of all respondents that self-identified a specific discipline, this chart shows the percentage of **organizations** vs **individuals**.

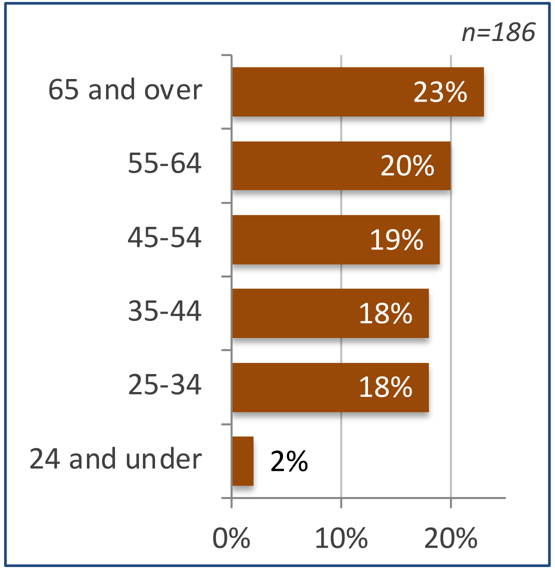
Respondents could select more than one discipline.

Question:
Which discipline(s) do you primarily practice, work in, work with, or represent?

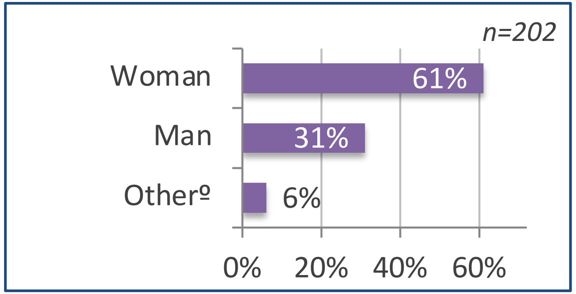
INDIVIDUALS

Demographics

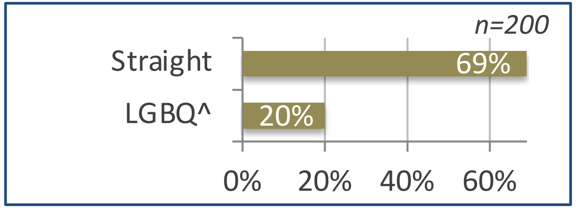
Age



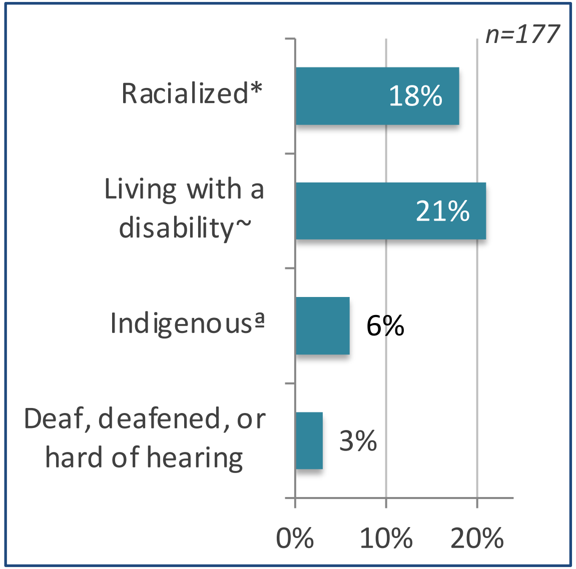
Gender



Sexual Orientation



Identify as...

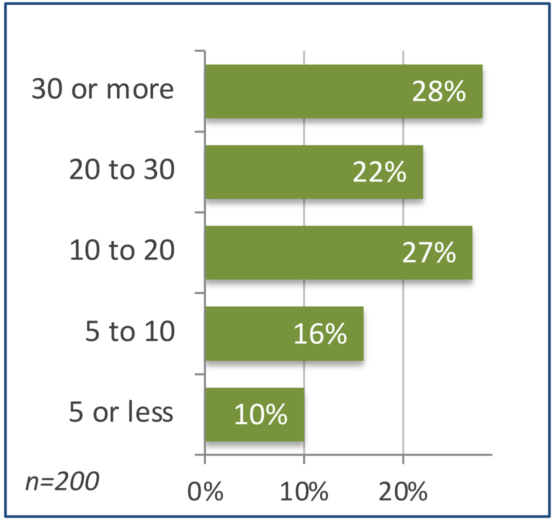


Otherº Self identified as transgender, two-spirit, non-binary, or a gender other than exclusively woman or man
LGBQ^ Self identified as lesbian, gay, bisexual, queer, or orientation other than exclusively straight/heterosexual
Living with a disability~ Self identified as a person who has/is: blind or low vision, physically impaired, mobility issues, neurodiverse, living with mental or chronic illness
Racialized Self identified as person of African, Asian, Middle Eastern, or Latin American descent, or mixed heritage that includes at least one of these groups*
Indigenousª Self identified as First Nations, Inuit, or Métis

INDIVIDUALS

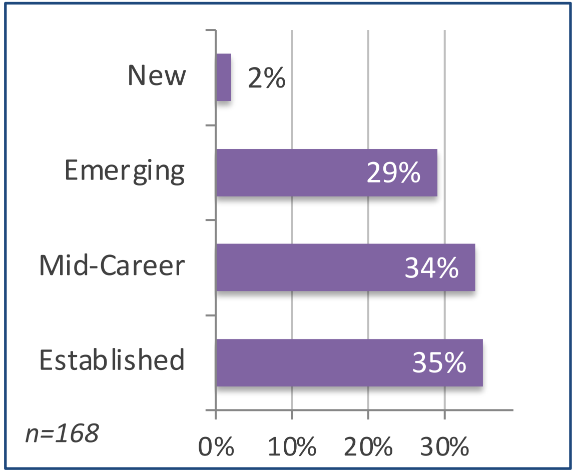
Sector Experience

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

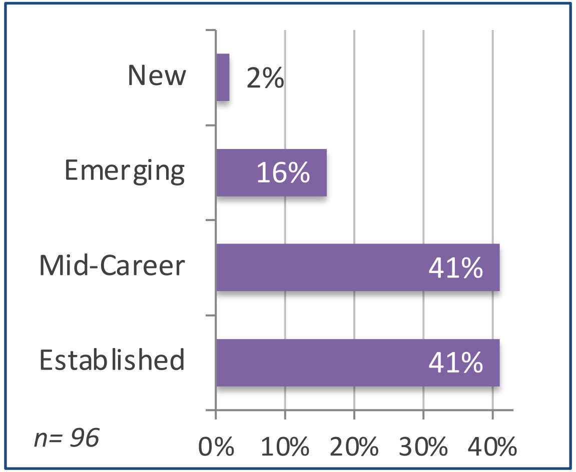


How would you identify your level of experience?

Artists
Level of Experience



Arts Workers
Level of Experience



INDIVIDUALS

Hours of Work

Now vs May/June 2021

Now vs Pre-COVID

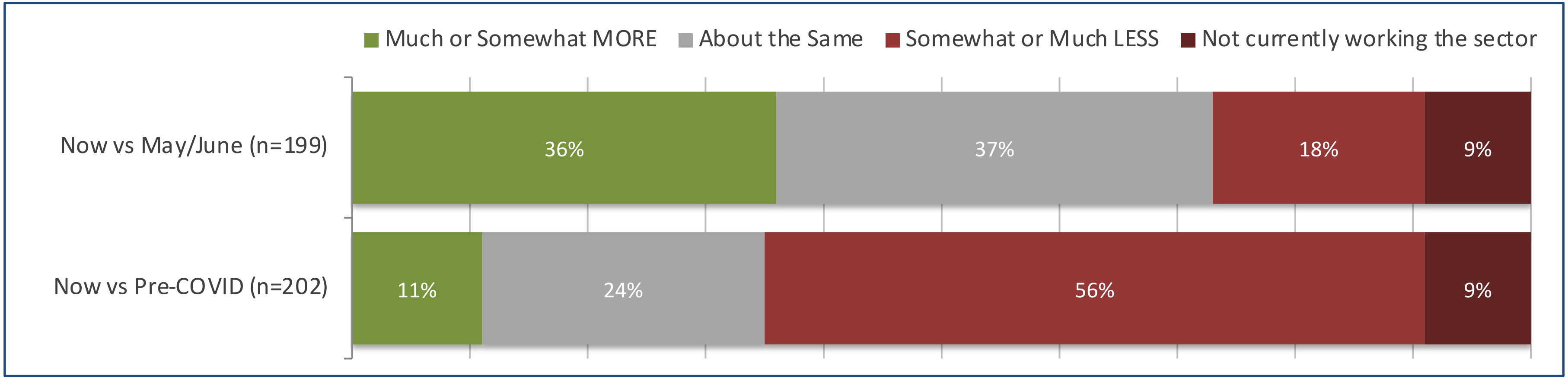
What We See

More than **one-third (36%)** of respondents are working in the arts and culture sector **much or somewhat more** now compared to May/June of this year.

56% of respondents are working in the sector **somewhat or much less** now compared to pre-COVID, and **9%** of respondents are **not currently working in the sector**.

How much are you currently working in the arts and culture sector?

Comparing Now vs Pre-COVID and Now vs May-June 2021.



INDIVIDUALS

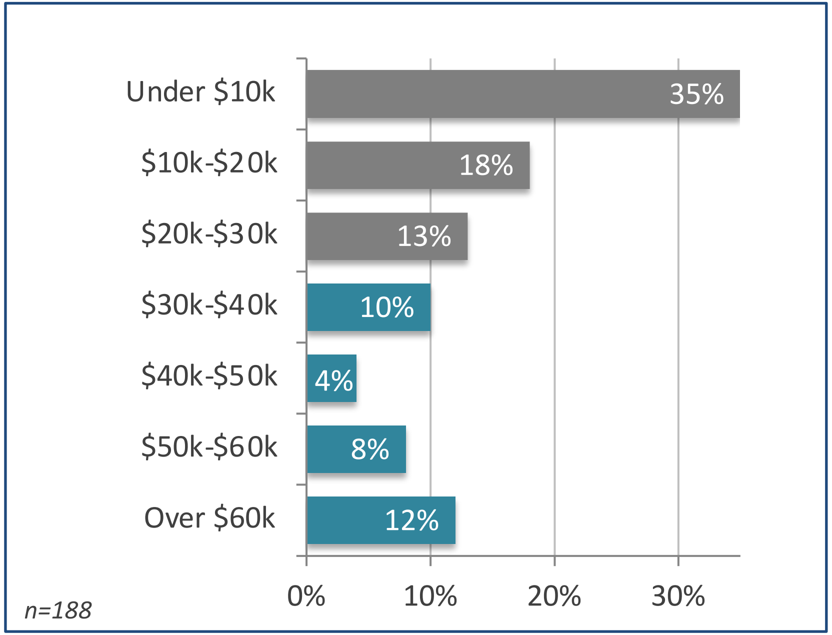
Annual Income

(Not including CERB, CRB, EI, etc)

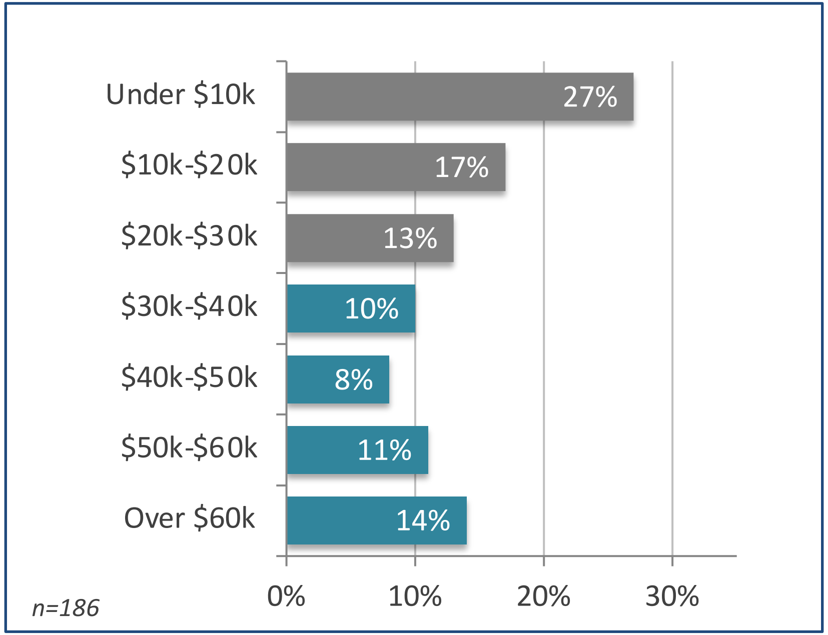
What We See

34% of respondents earned **$30k or more** in 2020, not including CERB, CRB, EI or other similar government supports. In 2021, there was a **9% increase**, to **43%** for the same income bracket of **$30k or more**.

2020 Actual Income



2021 Projected Income



INDIVIDUALS

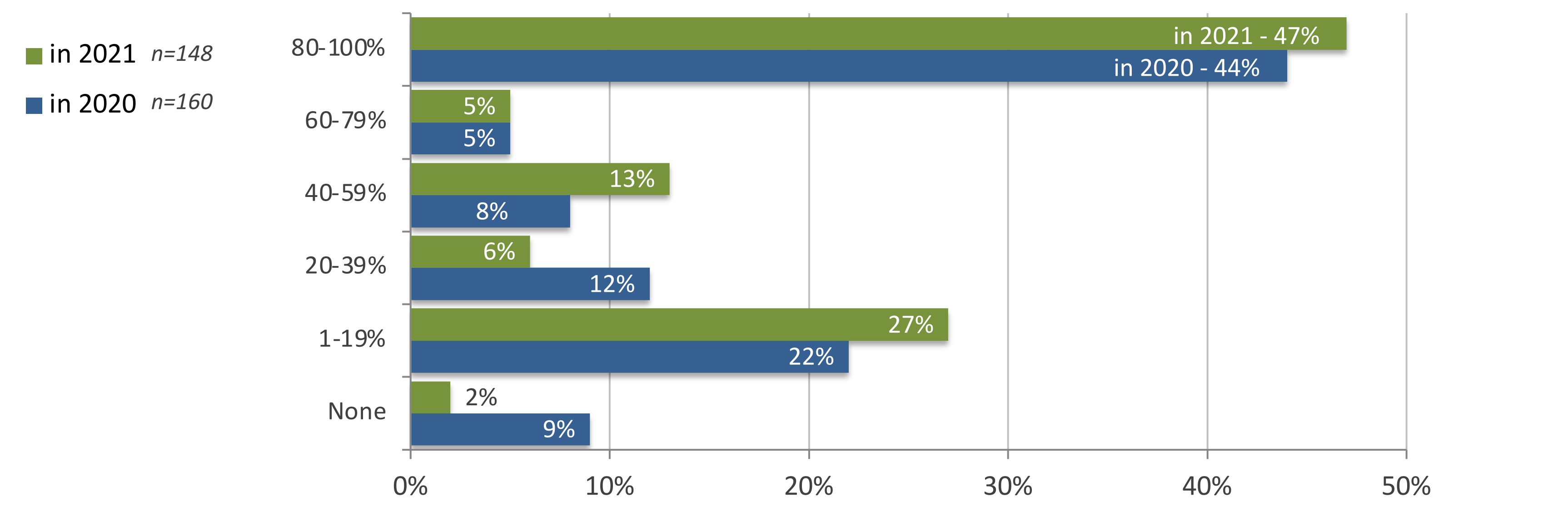
Source of Annual Income

What We See

A higher percentage of respondents earned income from the arts and culture sector in **2021** compared to **2020**.

91% reported they made some income from the sector in **2020**, which increased to **98%** in **2021**.

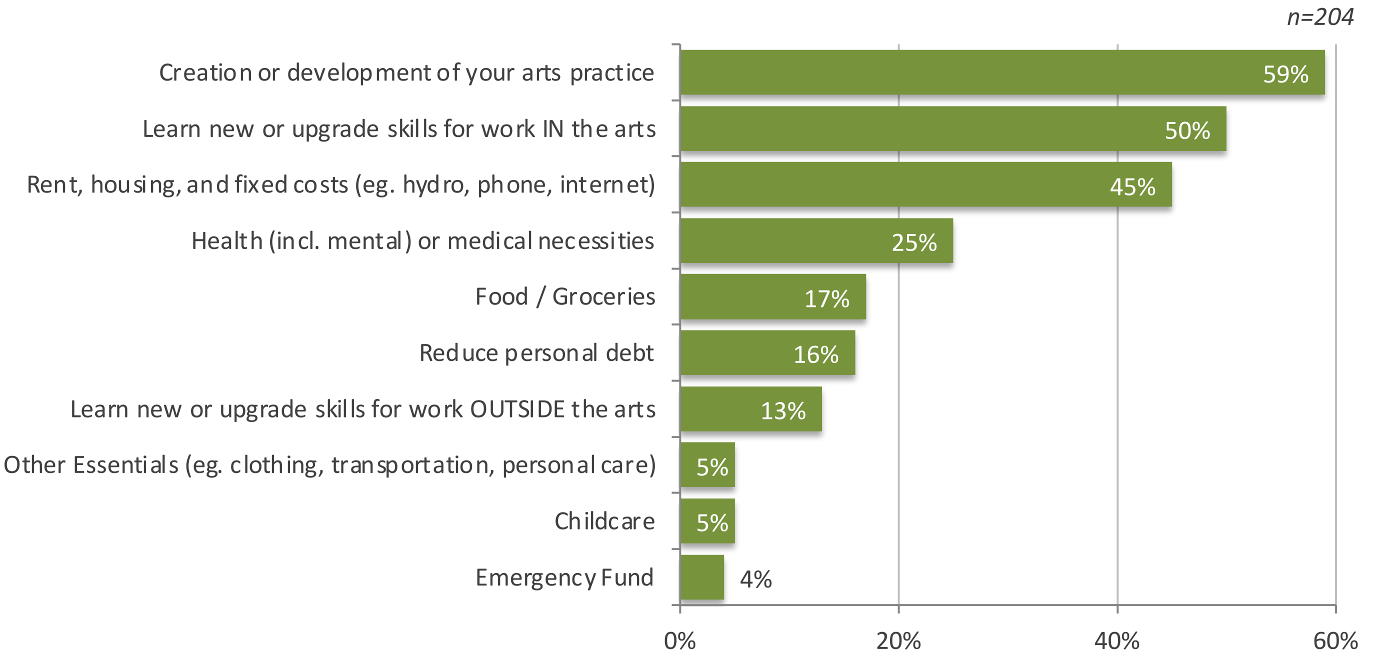
What percentage of your annual income came from the arts and culture sector?



INDIVIDUALS

Funding Scenario for Individuals

If a new unrestricted grant were available to you, what are the TOP THREE priority areas you would seek funding for?



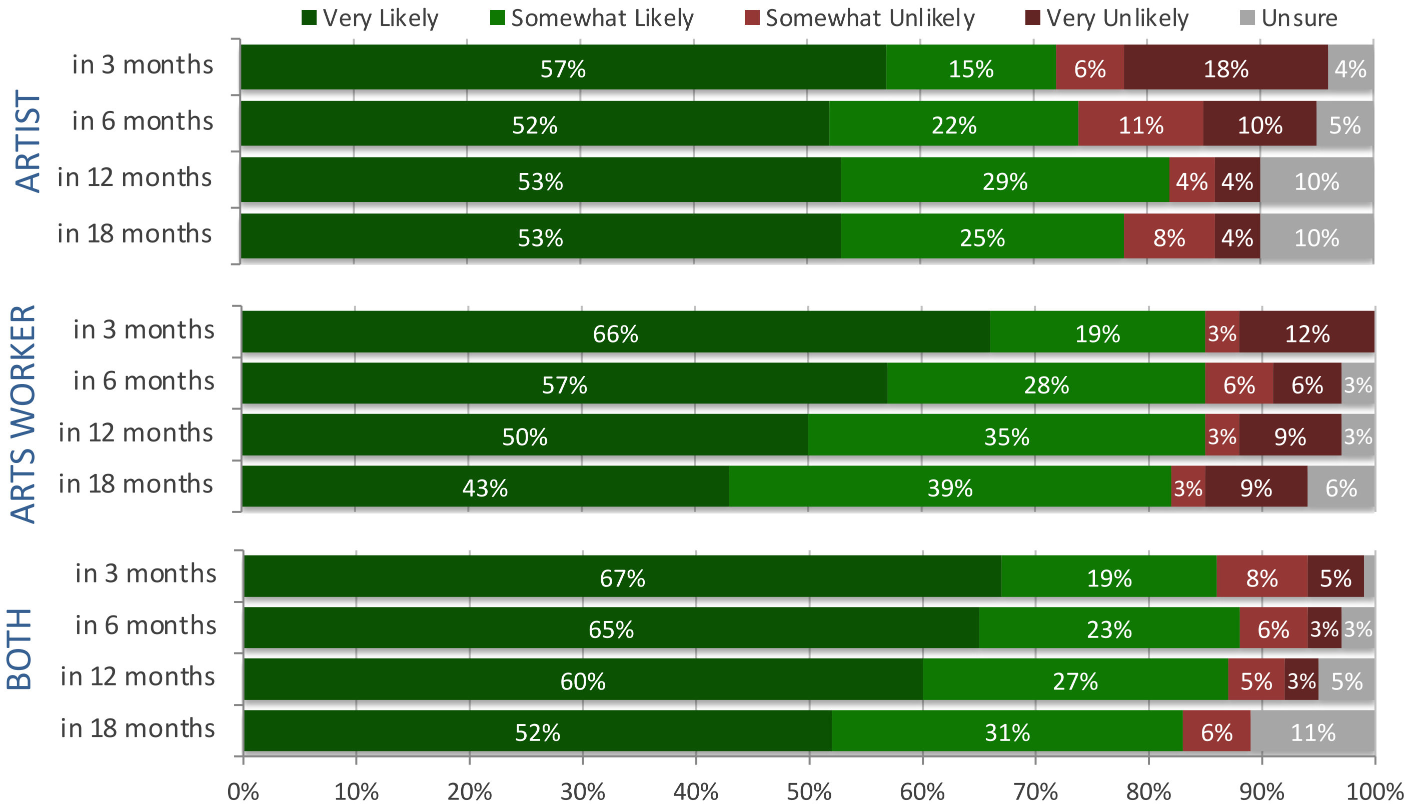
What We See

Top priority areas if unrestricted funds were available to individuals included investment in their arts practice (**59%**), professional development (**50%**), as well as housing and fixed expenses like utilities (**45%**).

Respondents could select up to three options.

INDIVIDUALS

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



What We See

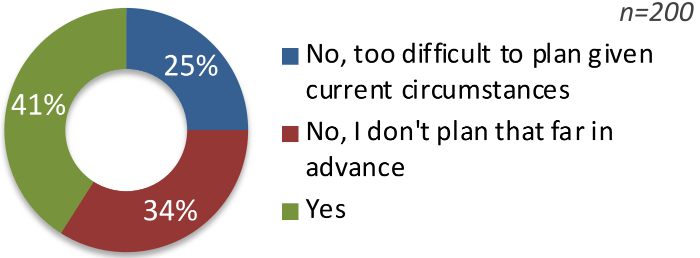
Individuals who identify solely as an **artist** consistently expect to continue working in the arts and culture sector over the next 18 months, ranging from **72%** to **82%** somewhat or very likely.

While those who identify solely as an **arts worker** and those who identify as **both** an artist and arts worker have a consistent likelihood of working in the sector, both have a significant decline in very likely responses. **Arts workers** are down 23 points from **66%** in 3 months to **43%** in 18 months; and **both** are down 15 points from **67%** to **52%**.

INDIVIDUALS

Planning for 2023

Are you currently actively planning artistic work and activities for 2023 or later?



What We See

95 individuals shared their considerations and concerns planning that far in advance.

Feeling of **uncertainty**, **financial concerns**, and **health-related comfort and restrictions** topped the list.

- “No idea what will be happening in the world”
- “Changes are happening so quickly and are so unpredictable that it’s difficult to plan ahead.”
- “Not sure if I want to stay in the industry.”
- “The ever changing whims of the future, weather, pandemic, economy, supply chains, you name it.”
- “Accessibility (vaccine passports, affordable rehearsal/performance space, increasing cost of living)”
- “I do not know where we will be at in the pandemic and as an immuno compromised individual I have been taking every precaution and not going out in public yet.”
- “It is hard to predict attendance numbers for 2022 and 2023, therefore hard to predict earned revenues, which impacts the entire operation.”
- “Pre covid, I booked my freelance schedule as early as 2 years out. My main clients are just getting back on their feet and not ready to work that far ahead.”

INDIVIDUALS

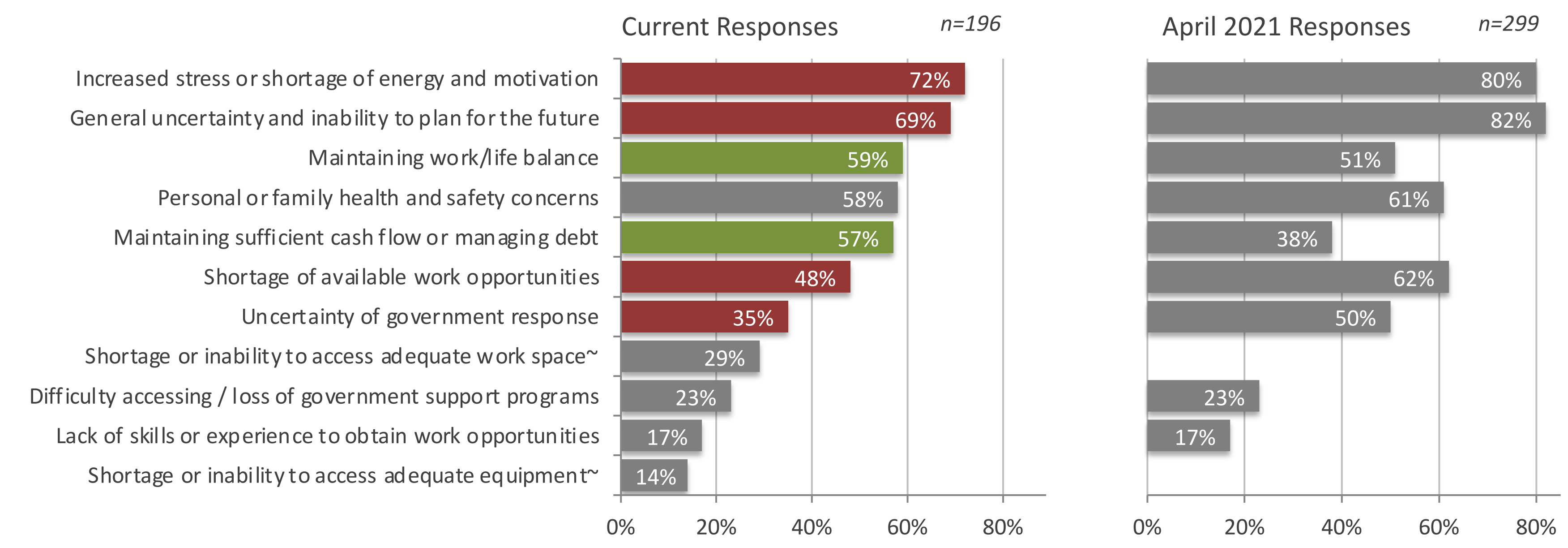
Recent Obstacles

Obstacles recently experienced by Individual respondents

What We See

Four obstacles had a **decrease of at least 5 points** compared to April 2021 survey responses: increased stress or shortage of energy (**-8%**), general uncertainty and inability to plan for the future (**-13%**), shortage of available work (**-14%**), and uncertainty of government response (**-15%**). Two obstacles saw an **increase of at least 5 points** compared to April responses: maintaining work/life balance (**+8%**) and maintaining sufficient cash flow (**+19%**).

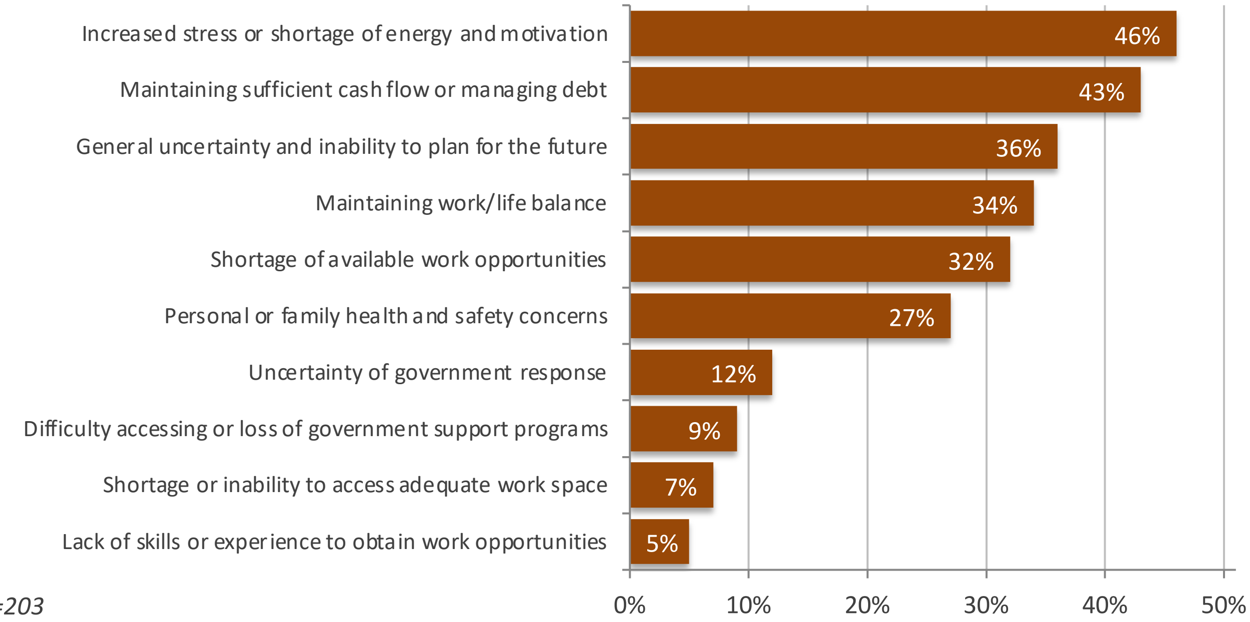
~Work space and equipment obstacles were previously combined and are not represented as a comparison here.



INDIVIDUALS

Anticipated Obstacles

Over the **NEXT SIX MONTHS**, which are your TOP THREE **OBSTACLES** you anticipate facing?



n=203

What We See

When thinking about anticipated obstacles over the coming months, the most common included increased stress or shortage of energy (**46%**) and maintaining sufficient cash flow (**43%**)

Other anticipated challenges include general uncertainty to plan for the future, work/life balance, and shortage of work opportunities.

Respondents could select up to three options.

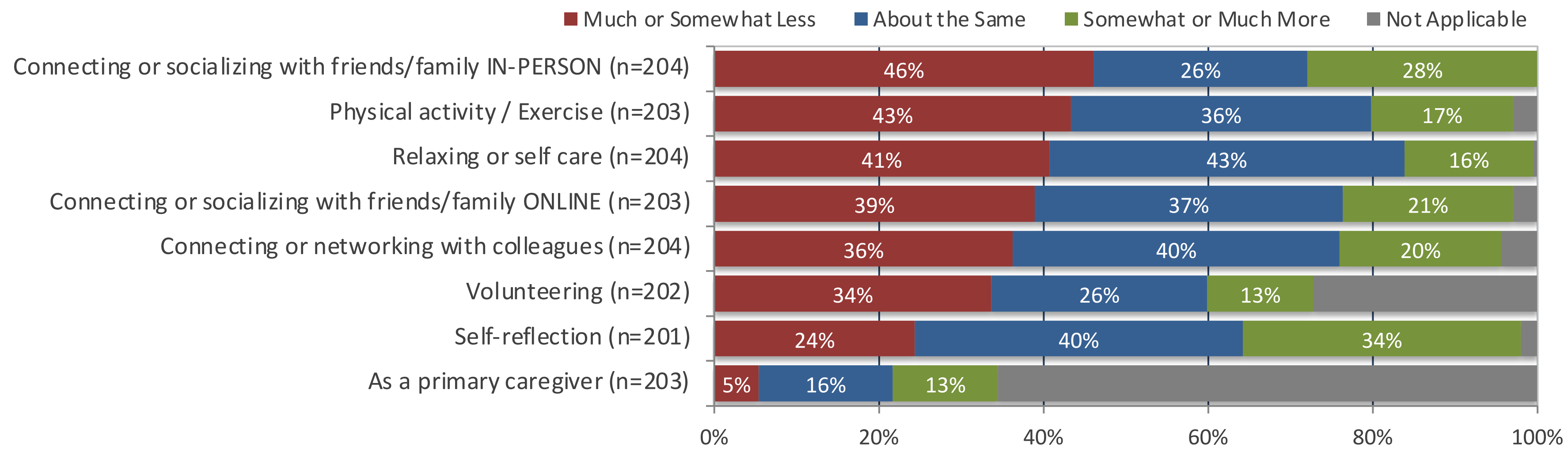
INDIVIDUALS

Impact on Other Activities and Responsibilities

What We See

Compared to six months ago, respondents overall are spending **less time** on the following activities: connecting with friends/family (**46%** in-person; **39%** online), exercise (**43%**), and self care (**41%**), and **more time** for self-reflection (**34%**) and as a primary caregiver (**13%**).

Compared to six months ago (May/June 2021), how much time do you now spend on the following activities or responsibilities?



INDIVIDUALS

Impact on Relationships

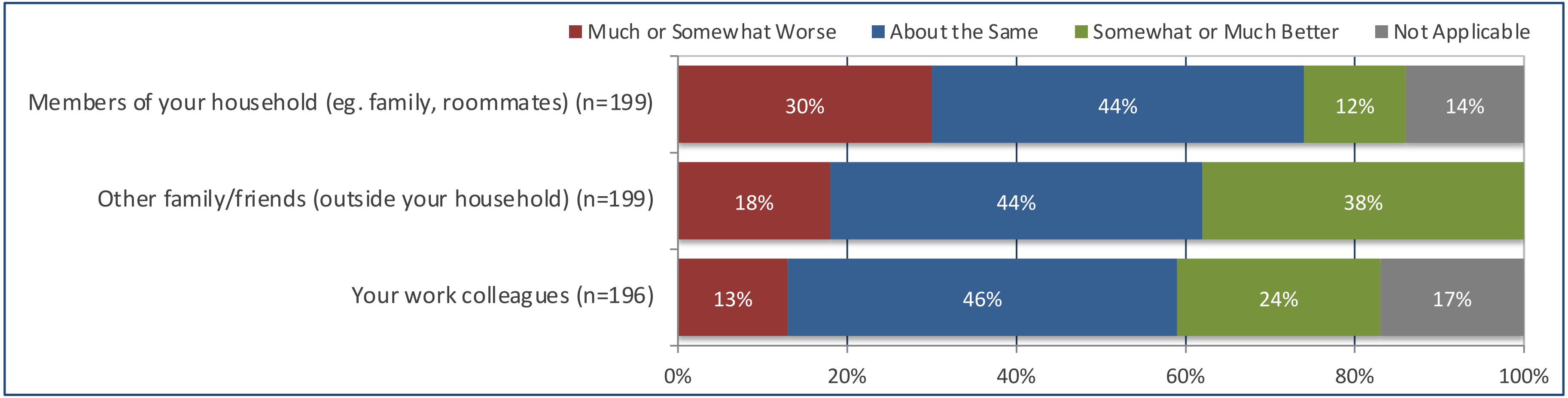
What We See

Overall, nearly half (**44-46%**) of respondents reported their relationships have **remained the same** compared to pre-pandemic.

More individuals report relationships with members of their household are **worse now than pre-pandemic** (**30%**) compared to those who say it's **somewhat or much better** (**12%**).

Conversely, more respondents say their relationship with friends and work colleagues are **better** (**38%** and **24%** respectively) compared to **worse** (**18%** and **13%** respectively).

Compared to before the pandemic, how would you rate your relationships with:



INDIVIDUALS

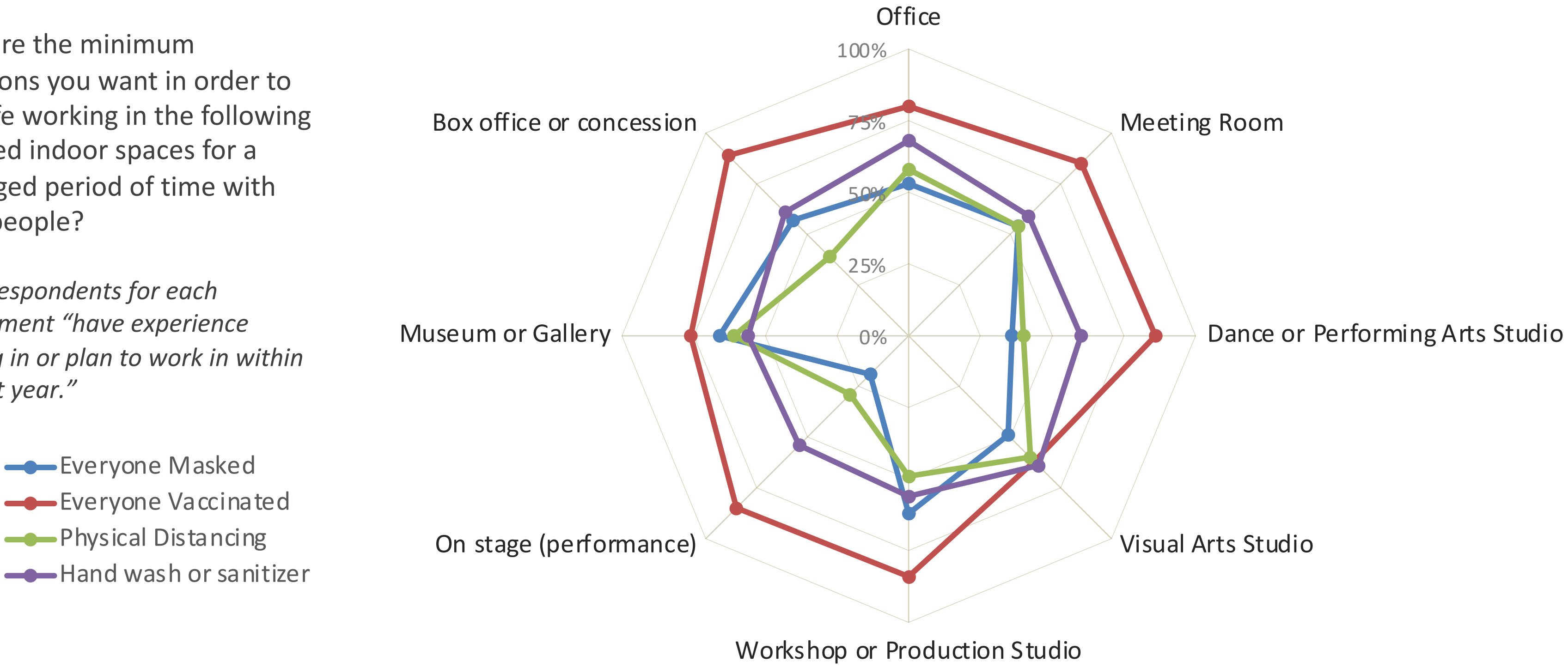
Environmental Comfort (while working)

What We See

We see a higher percentage of respondents wanting **everyone vaccinated** compared to other conditions in order to feel safe working in most spaces. Needs vary dependent on different **working environments**. For example, for respondents working on-stage **less than 25%** expect **masks**, just **over 25%** want **distancing**, **over 50%** want **hand sanitizer**, and **nearly all** want **everyone vaccinated**.

What are the minimum conditions you want in order to feel safe working in the following enclosed indoor spaces for a prolonged period of time with other people?

Note: Respondents for each environment "have experience working in or plan to work in within the next year."



INDIVIDUALS

Environmental Comfort (while working)

Expectation of certain conditions based on working environment.

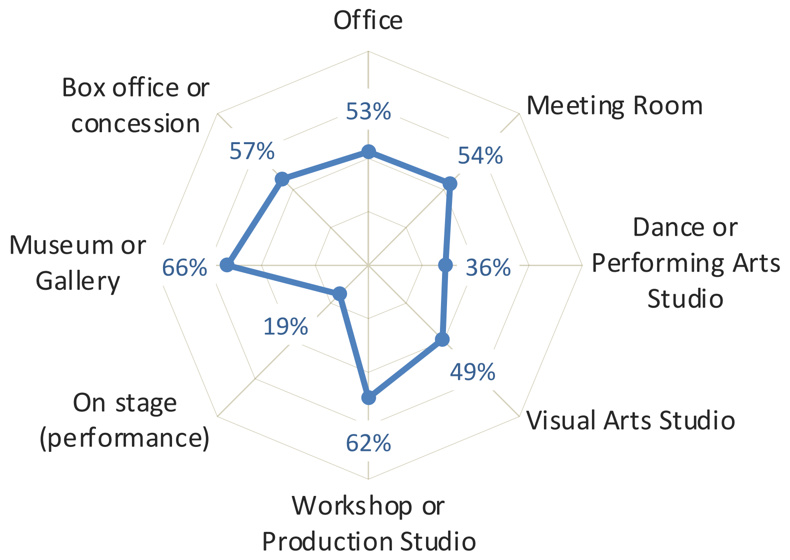
Note: Respondents for each environment "have experience working in or plan to work in within the next year."

What We See

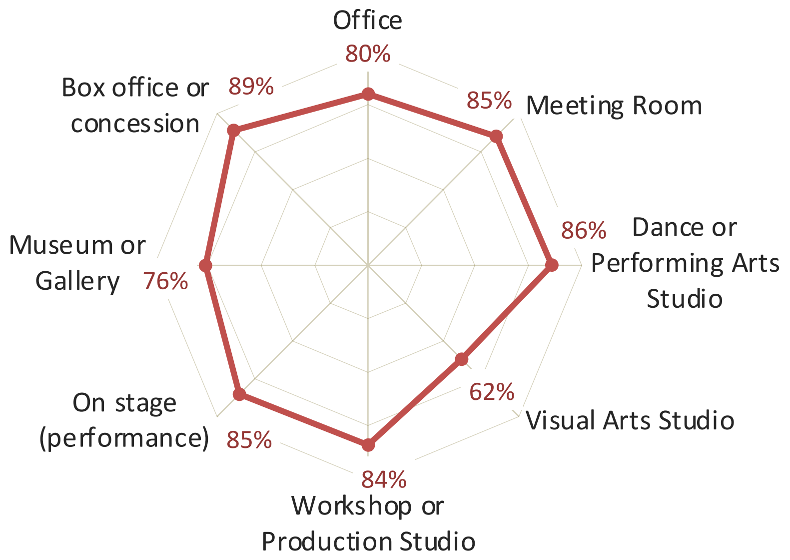
In general more than **50%** of workers expect **mandatory masking** regardless of the space, with the exception of on-stage (**19%**), dance studio (**36%**), and visual arts studio (**49%**).

Over **three-quarters** expect **everyone to be vaccinated**, with fewer respondents indicating that within a visual arts studio (**62%**).

Everyone Masked



Everyone Vaccinated



INDIVIDUALS

Environmental Comfort (while working)

Expectation of certain conditions based on working environment.

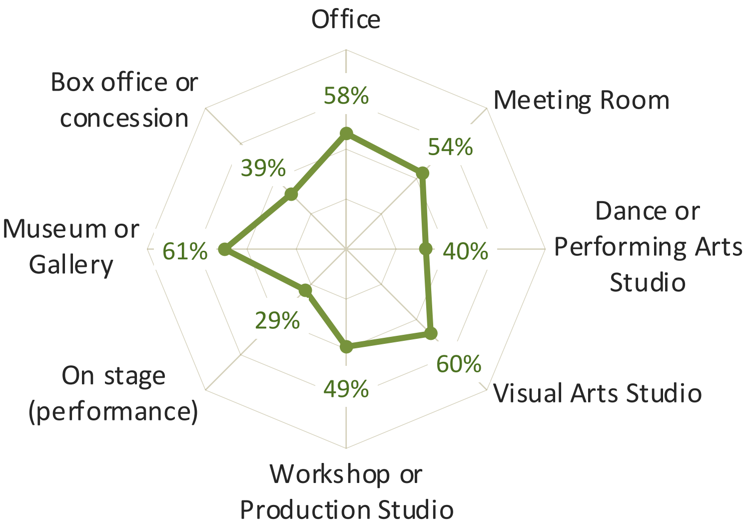
Note: Respondents for each environment "have experience working in or plan to work in within the next year."

What We See

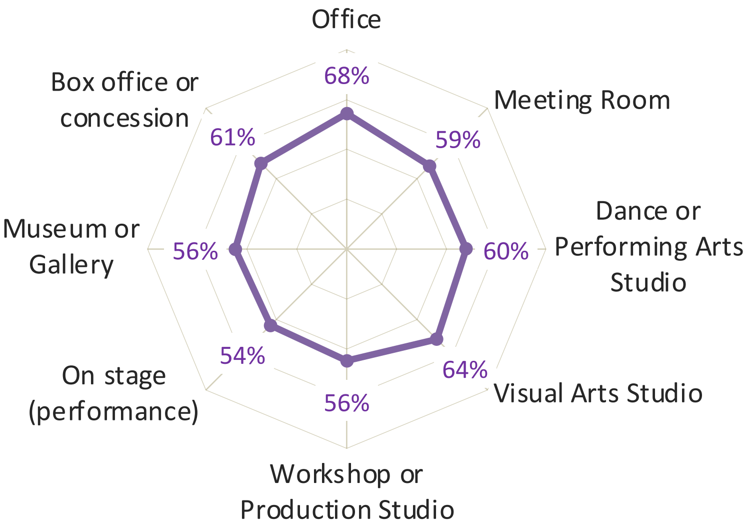
Higher percentage of respondents expect **physical distancing** when working in a museum/gallery (**61%**), visual arts studio (**60%**), and office (**58%**), compared to when working on stage (**29%**) or in a box office environment (**39%**).

Hand wash or sanitizer is generally expected (**54% to 68%**) in all working environments with no significant difference based on space.

Physical Distancing



Hand Wash or Sanitizer



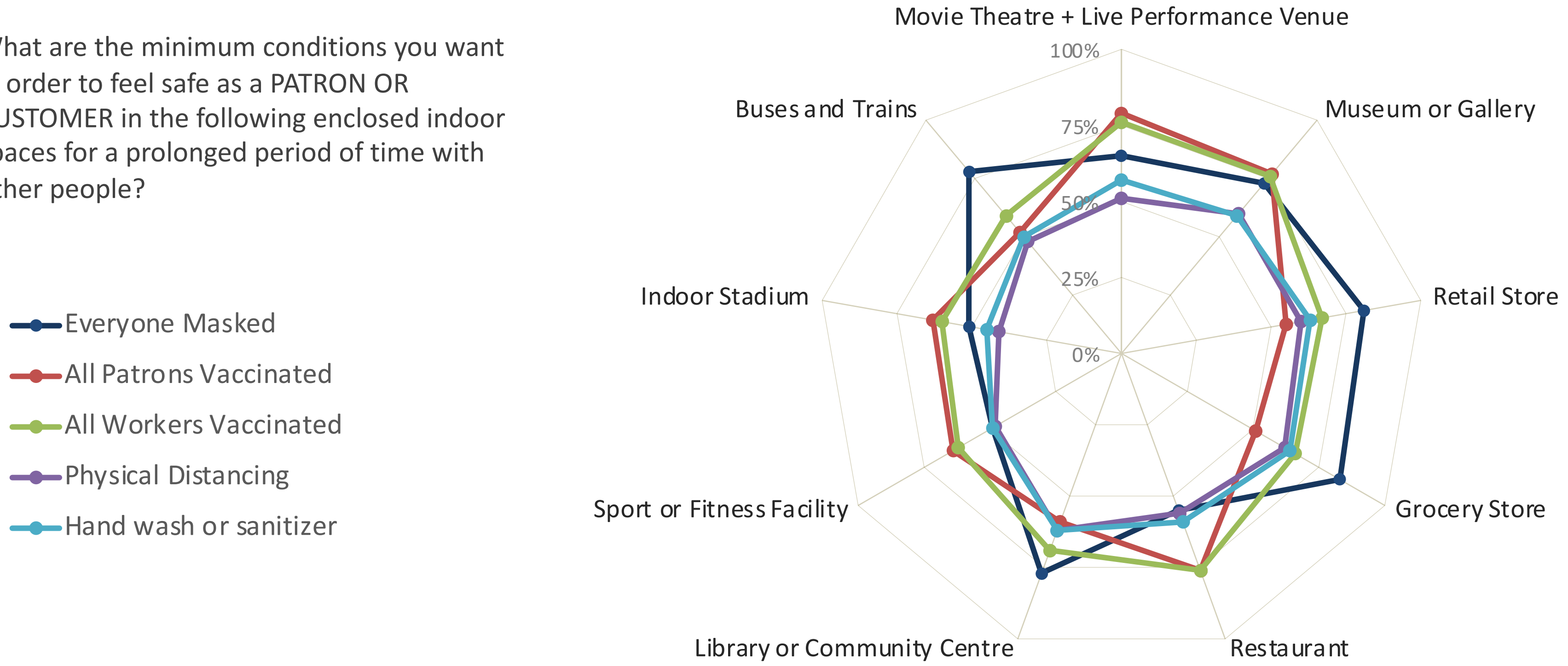
INDIVIDUALS

Environmental Comfort (social)

What are the minimum conditions you want in order to feel safe as a PATRON OR CUSTOMER in the following enclosed indoor spaces for a prolonged period of time with other people?

What We See

The minimum conditions needed to feel safe in varying **social environments** varied depending many factors, including the nature of the activity, length of time in a space, and walk-through vs seated. For example, **vaccination** (**patrons** + **workers**) and **masks** are similarly prioritized for museums, but have a **15-point spread** between them when in a grocery store.



INDIVIDUALS

Environmental Comfort (social)

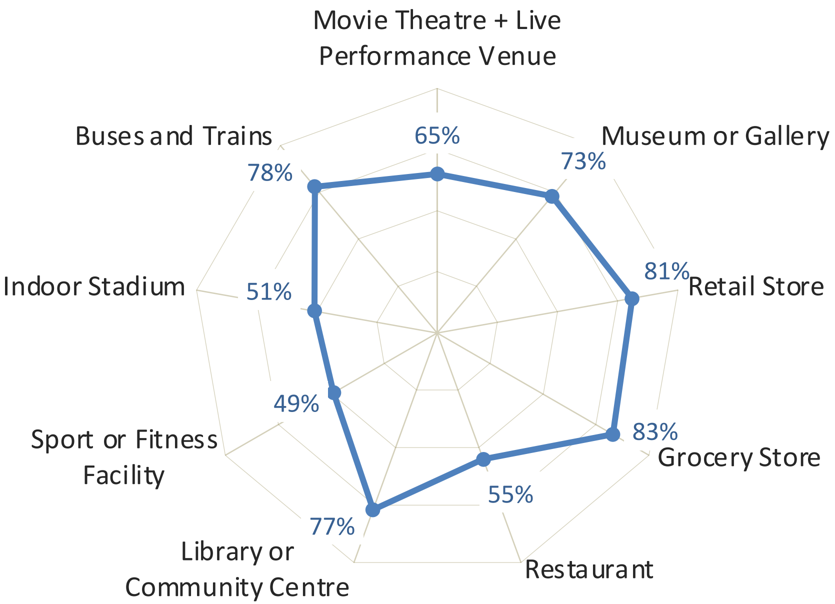
Minimum conditions as a patron or customer.

What We See

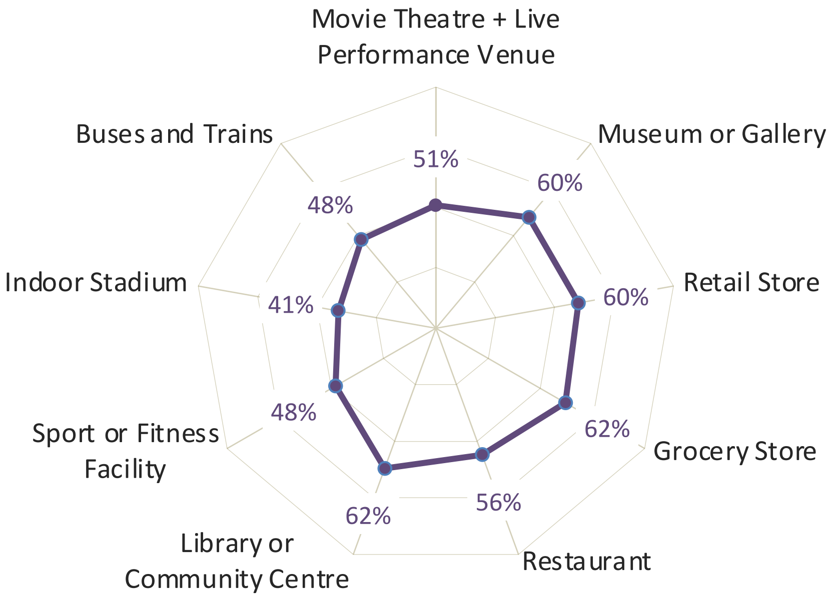
Masks are a priority for **three-quarters** of respondents in walkthrough and essential services spaces like grocery store (**83%**), retail store (**81%**), buses (**78%**) and museums (**73%**).

Expectation of **physical distancing** is highest in environments such as a grocery store (**62%**), library (**62%**), museum (**60%**) and retail store (**60%**).

Everyone Masked



Physical Distancing



INDIVIDUALS

Environmental Comfort (social)

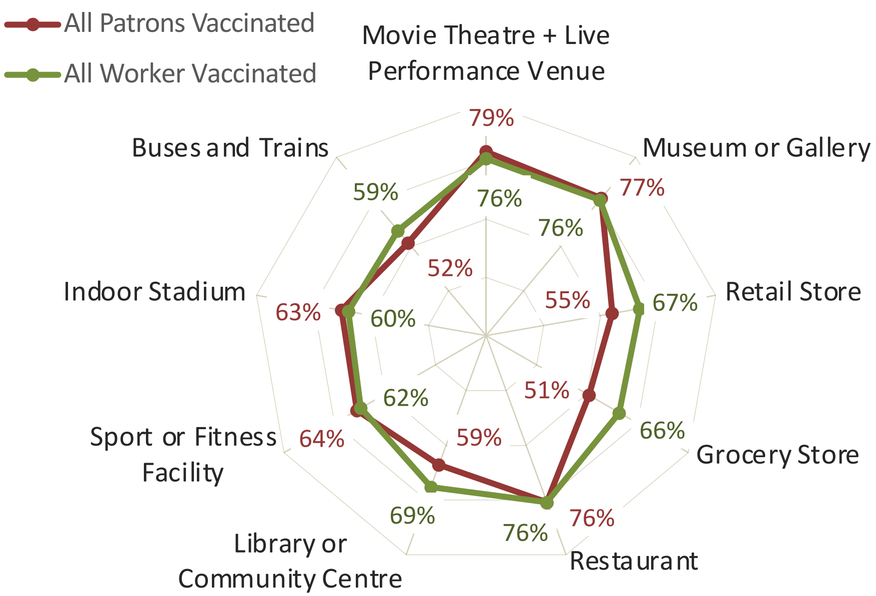
Minimum conditions as a patron or customer.

What We See

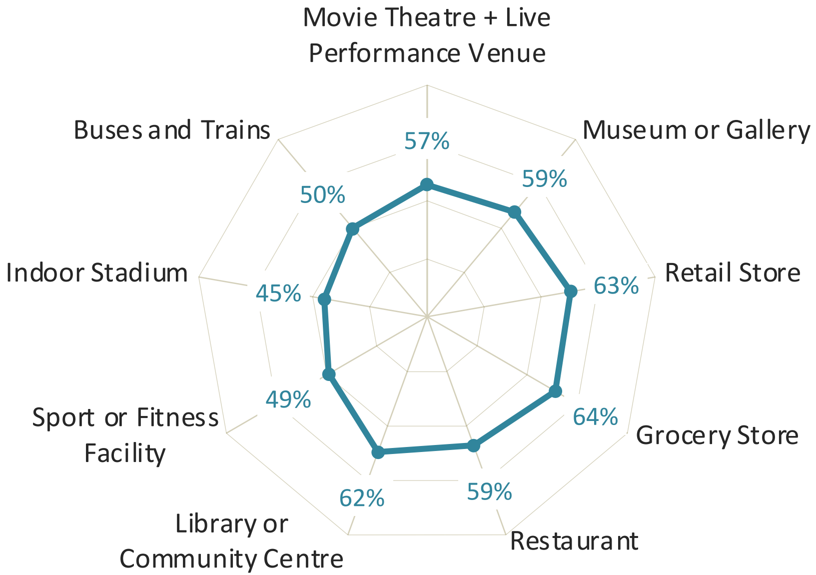
In general, essential services such as grocery stores, libraries, and buses saw a higher expectation of **vaccinated workers**, whereas spaces such as live performance venues, fitness facilities, galleries, and stadiums have similar expectations that **both patrons and workers** are vaccinated.

Hand sanitizer is most expected in spaces such as a grocery store (**64%**) and retail store (**63%**), and library (**62%**).

Patron vs Worker Vaccination Status



Hand Wash or Sanitizer



ORGANIZATIONS

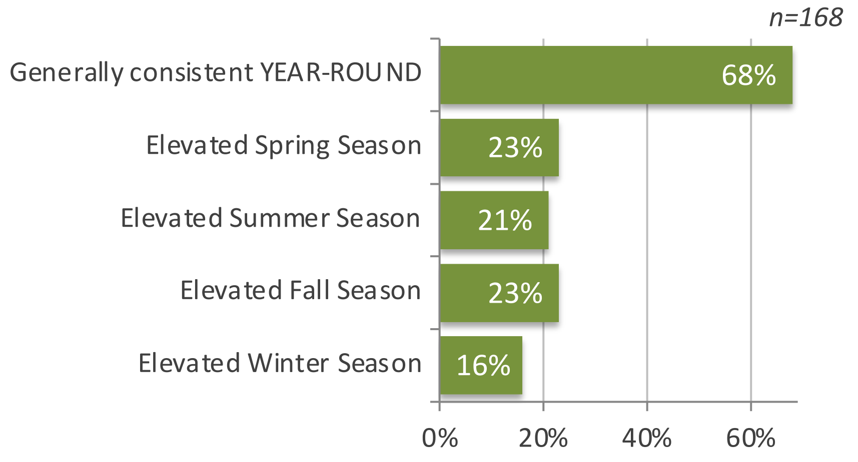
The Respondents: Operations

What We See

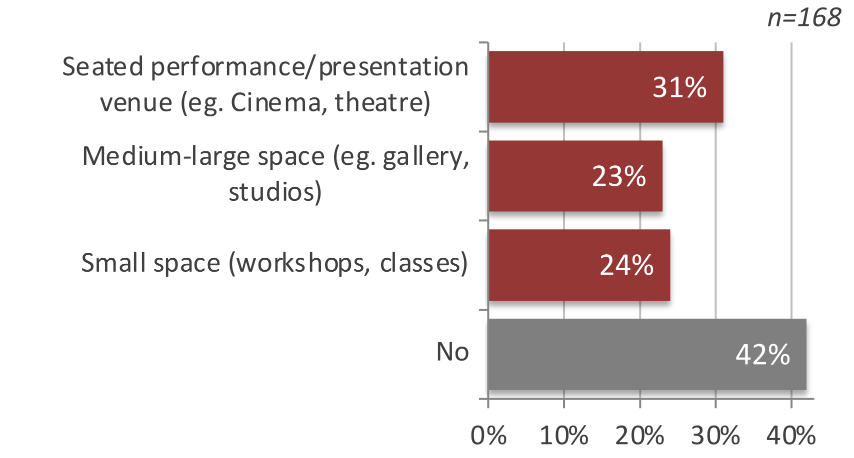
The majority (**68%**) of organizations operate year-round with approximately **one in five** indicating elevated activity during each of the four seasons.

Over half of the respondents have a **venue or facility used for programming or non-admin activities**. **31%** operate a presentation venue, **23%** run a medium to large gallery or studio, and **24%** have a smaller space ideal for workshops or classes.

How would you describe your operations?



Do you currently operate a venue or facility for programming or non-admin activities?



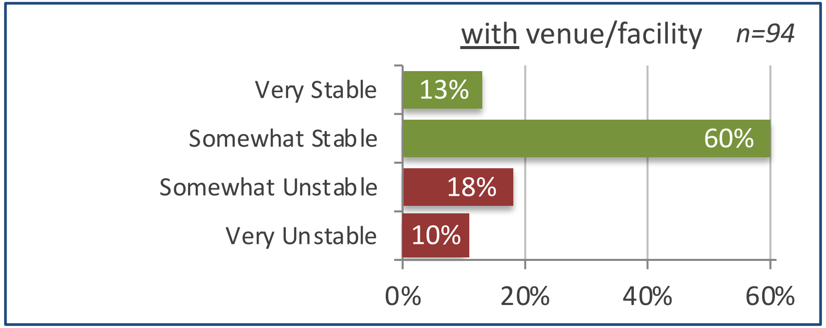
ORGANIZATIONS

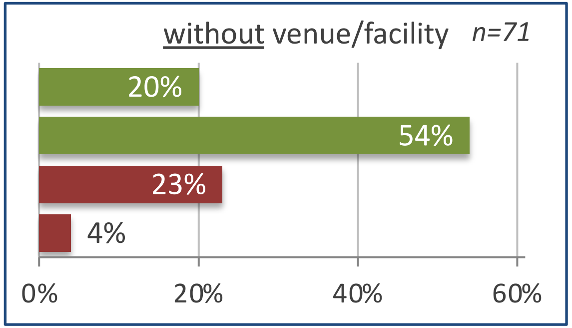
Threats

What We See

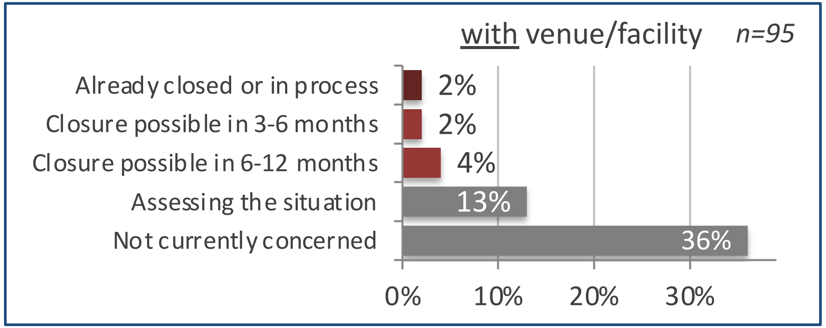
Approximately a **quarter** of respondents are **financially unstable** (**28%** with venue; **27%** without venue).

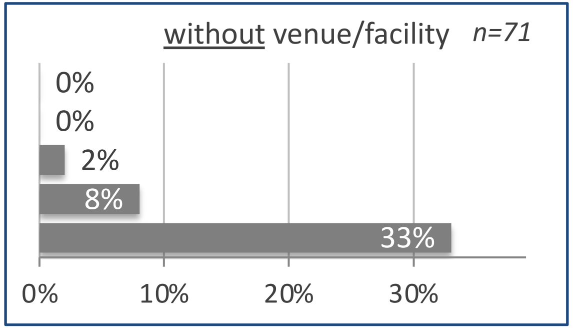
How stable is your organization's financial position?





Is your organization under serious threat of PERMANENT closure / ceasing operations?





Compared to those without a venue, organizations with a venue or facility are under greater **threat of closing within the next year** (**6%**), and **2%** have **already or in process of closing permanently**.

Contributing factors included:

- "Drop in revenue due to closure, with increased expenses going digital.";
- "Lack of secure operating funds.";
- "Unless visitation and revenues return to pre-COVID levels, we will have to either reduce operations, take on additional debt to fund operations, or close.";
- "We have recently been able to open again and produce income, but have accumulated so much debt over the last two years, we're not certain how we will be able to pay it back."

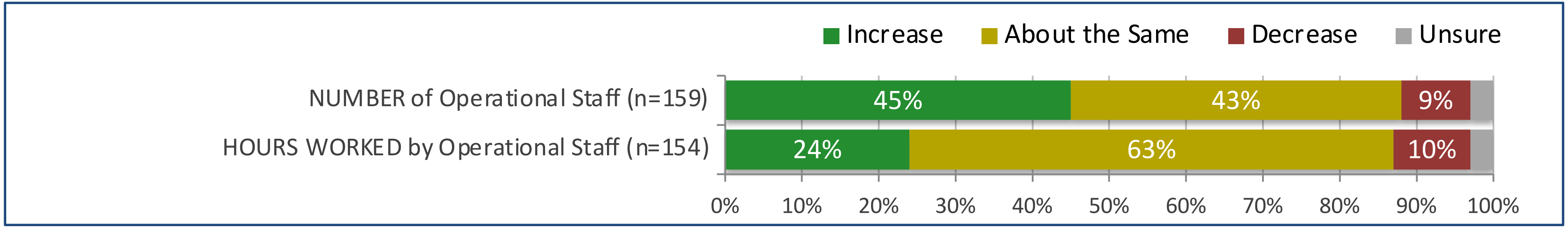
ORGANIZATIONS

Employment

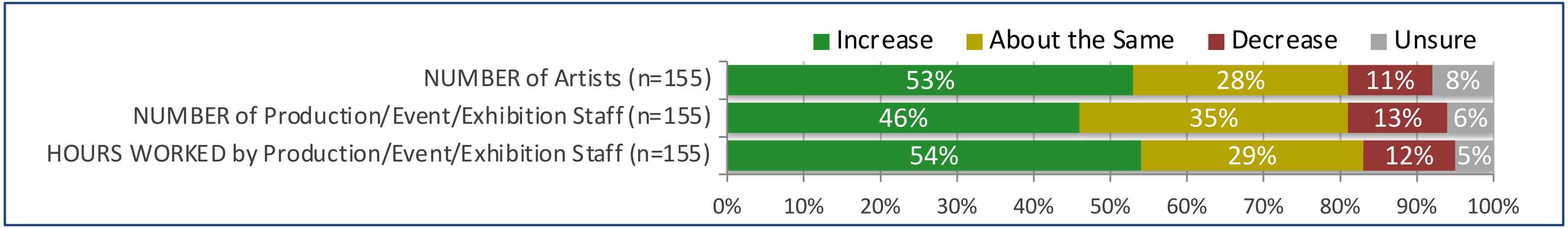
What We See

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

Compared to the last 4 months, how do you expect your **operational staff** to change over the next 4 months?



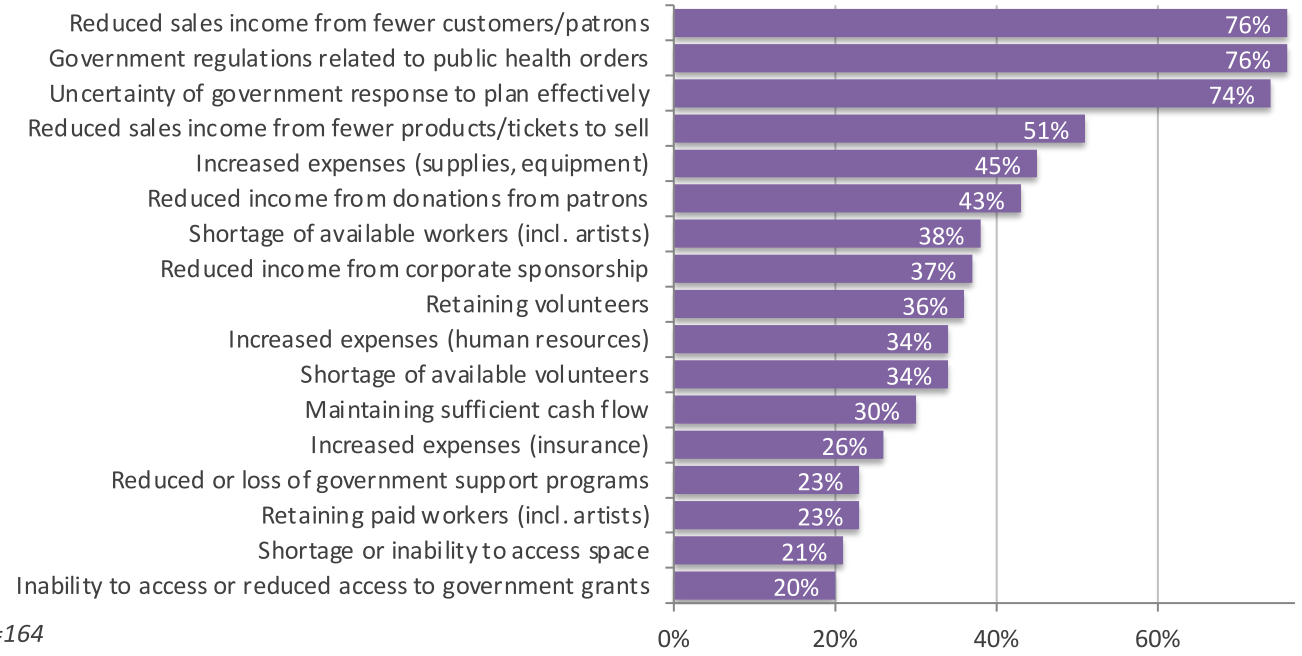
Compared to the last 4 months, how do you expect your **artist contracts** and **staff** for **production, events, and exhibitions** to change to the next 4 months?



ORGANIZATIONS

Recent Obstacles

Over the LAST SIX MONTHS, which of the following were **OBSTACLES** your organization has faced?



n=164

What We See

Most organizations identified multiple obstacles, with the most consistent being reduced income from fewer patrons, government regulations related to public health orders (each **76%**), and uncertainty of government response affecting their ability to plan effectively (**74%**).

Lesser reported obstacles included reduced income due to reduced activity and capacity, more expenses, and a reduction in revenue from donations and sponsorships.

From a list of 21 options, represented here are obstacles selected by 20% or more of the respondents.

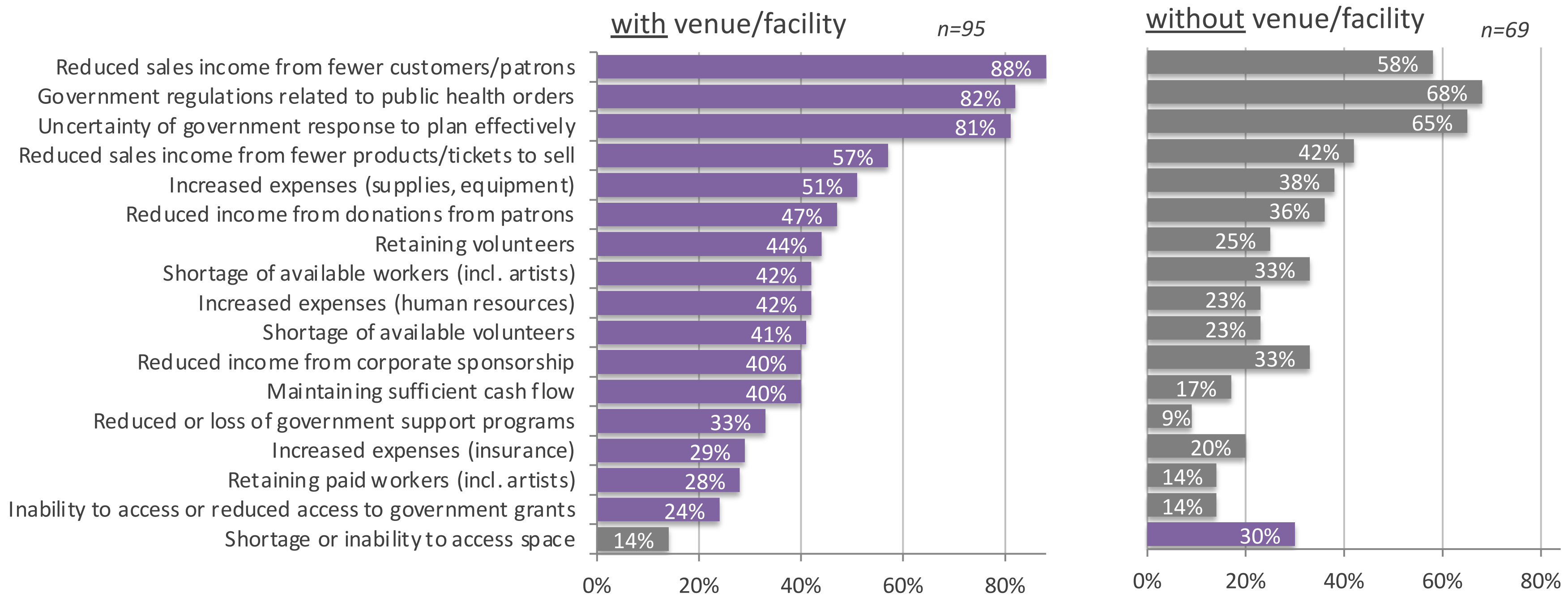
ORGANIZATIONS

Recent Obstacles with vs without a venue or facility

Over the LAST SIX MONTHS, which of the following were **OBSTACLES** your organization has faced?

What We See

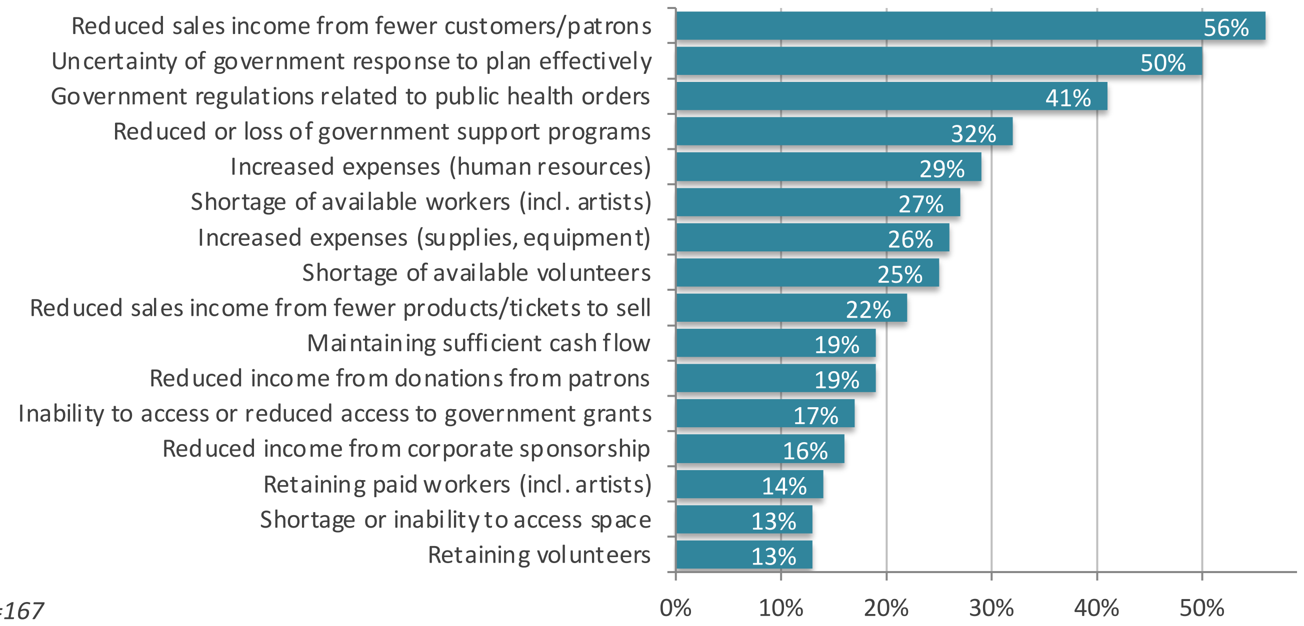
A **higher percentage** of organizations that operate a **venue or facility used for programming** face a broad variety of obstacles, compared to those **without a venue**. **More** organizations **without a venue** have difficulty accessing space.



ORGANIZATIONS

Anticipated Obstacles

Over the NEXT SIX MONTHS, what are the TOP FIVE **OBSTACLES** your organization anticipates facing?



n=167

What We See

Most organizations identified multiple anticipated obstacles over the coming months, the most consistent being reduced sales income due from fewer patrons (**56%**) and an uncertainty of government response to plan effectively (**50%**).

Other obstacles included government regulations, reduced or loss of government support programs, and increased expenses for human resources.

From a list of 22 options, represented here are obstacles selected by 10% or more of the respondents.

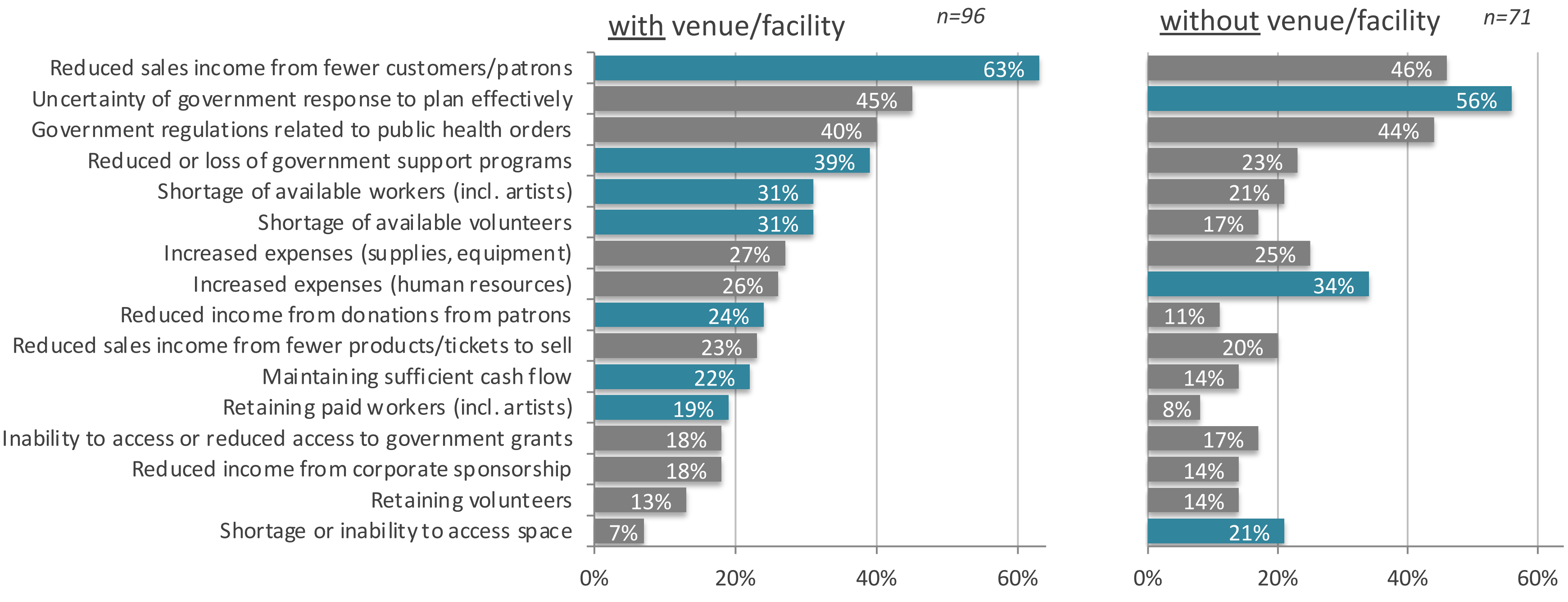
ORGANIZATIONS

Anticipated Obstacles with vs without a venue or facility

Over the **NEXT SIX MONTHS**, what are the TOP FIVE **OBSTACLES** your organization anticipates facing?

What We See

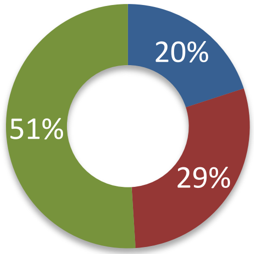
Many of the anticipated obstacles are common across organizations, but there are some differences when comparing those with facilities used for programming compared to those without.



ORGANIZATIONS

Planning for 2023

Is your organization currently actively planning programs and activities for 2023 or later?



What We See

97 organizations shared their considerations and concerns planning that far in advance.

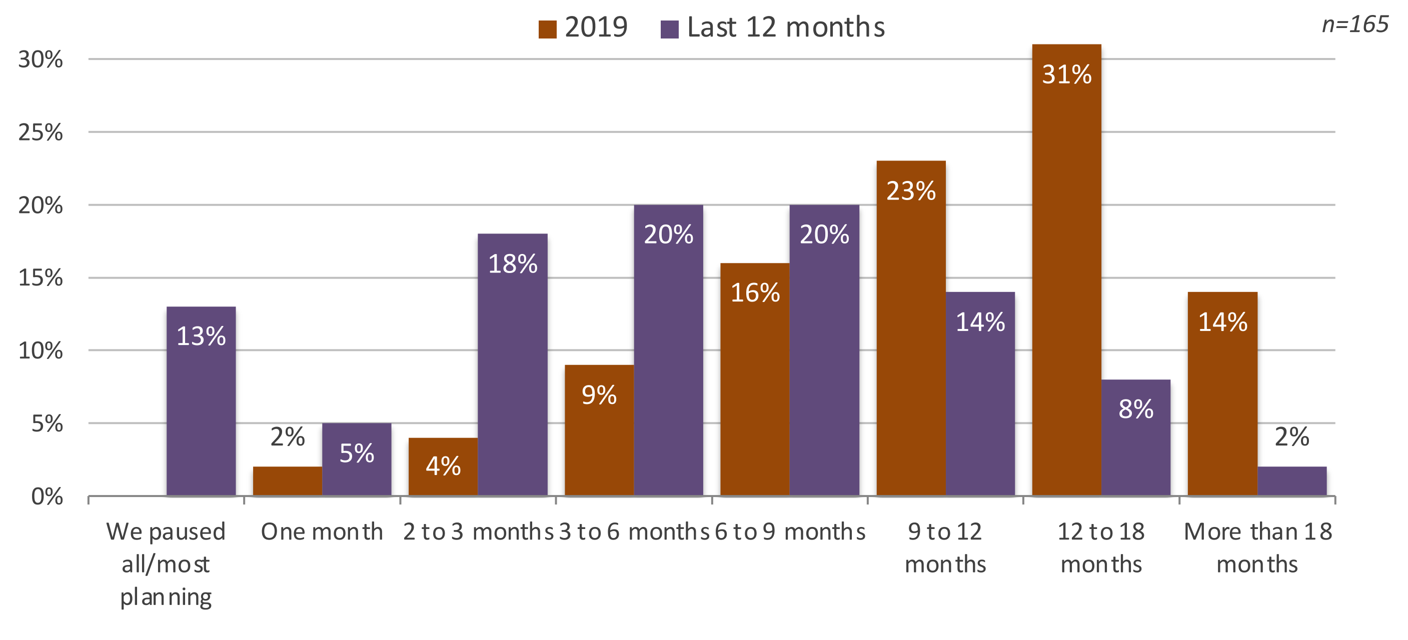
The feeling of **general uncertainty**, **financial concerns**, **human resources capacity**, and **changing restrictions** topped the list.

- "Artists schedules are in flux due to the domino effect of COVID cancellations."
- "We are so far behind in our planning cycles because we are also still in the process of finalizing our early 2022 programming."
- "We're still planning/reconfiguring on basically a weekly basis at this point."
- "Inflated costs of marketing and construction materials."
- "Fear of closure due to the continuation of the pandemic or potential effects of climate change."
- "Staff burn out."
- "Assuming that patron interest & engagement remains the same or increases over time as we recover from the pandemic. this has not been proven to date."
- "Our emotional and physical resources are maxed."
- "[Need to understand] patron interest and comfort."
- "Touring has not returned, costs are high and risk tolerance is lower than it was before the pandemic."

ORGANIZATIONS

Planning Cycle in past two years

How many months in advance did you start actively planning your programming, activities, and logistics in **2019**? What about in the **last 12 months**?



What We See

Significant shifts in planning timelines took place due to the pandemic. In **2019** **45%** of respondents started planning activities at least 12 months in advance. That dropped to 10 % of respondents in the **last 12 months.**

Over the **past year**, **13%** paused all or most of their planning.

Respondents whose planning cycle was between 2 to 6 months jumped **25 points** from **13%** in **2019**, to **38%**.

ORGANIZATIONS

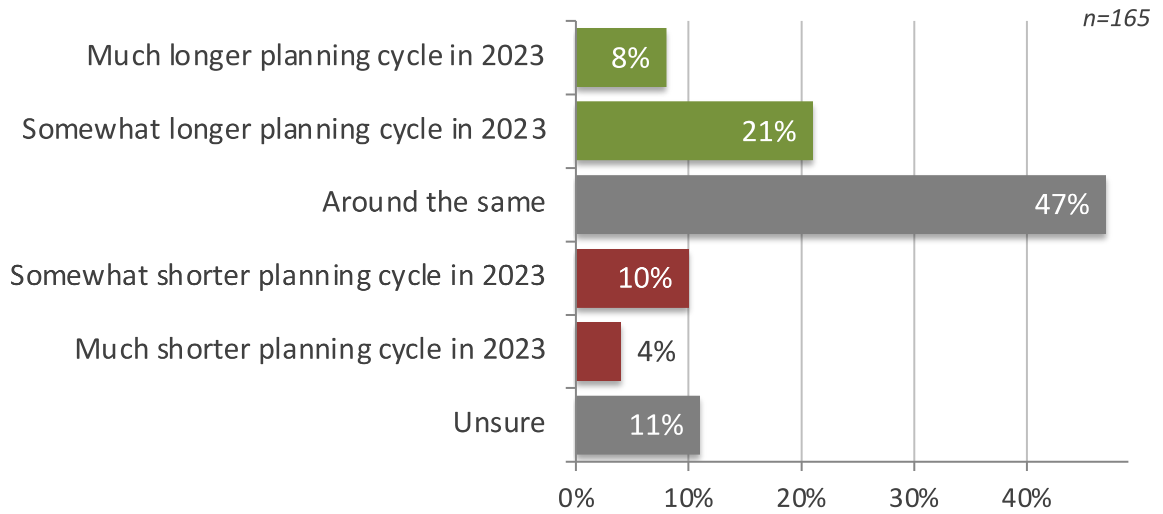
Planning Cycle in 2023

Imagine you're in the year 2023, how do you think your planning cycle will change compared to 2019?

What We See

29% of respondents expect that their **planning cycle will be longer** in 2023 compared to 2019. Reasons include:

- Addressing **organizational capacity** and **changing models** ("Our entire business model has shifted." "Create less hectic production cycles." "We need to re-stabilize and review our operations to rebuild audience.")
- Being **cautious** and waiting for **more predictability** ("Hoping that the health climate will be more settled." "We don't have any informed data on patron returns beyond advance sales." "Plan for contingencies and possible shifts.")



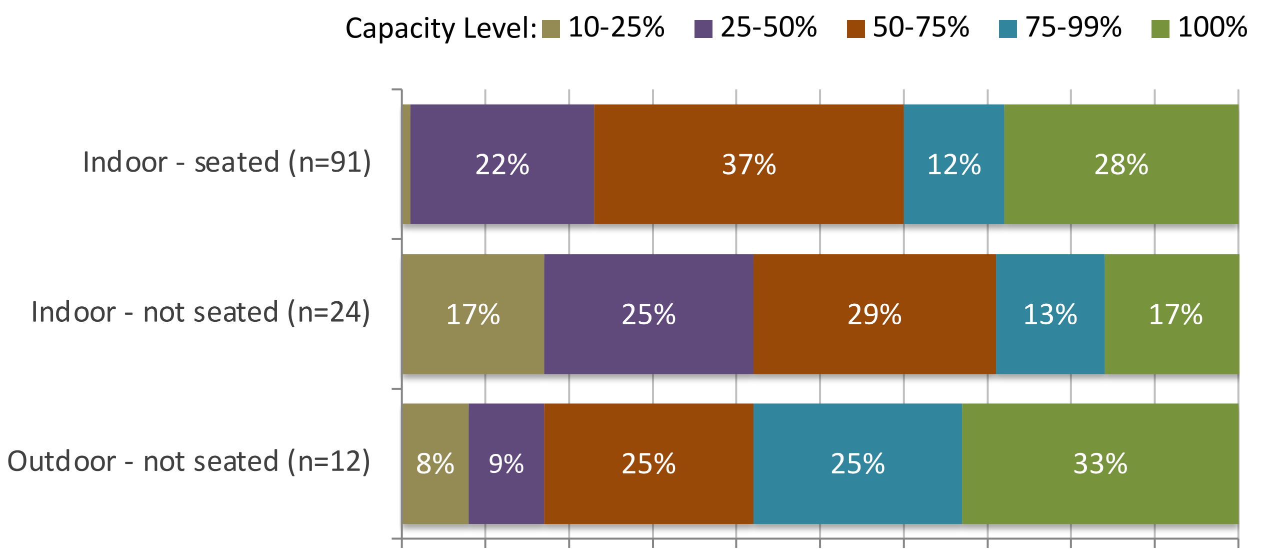
14% of respondents expect that their **planning cycle will be shorter** in 2023 compared to 2019. Reasons include:

- **Uncertainty and predictability** ("We expect to plan for 2023 later in 2022, when more information is available on whether and how COVID-related regulations are going to be changed." "Festivals and presenters can't afford to lose funds on projects that can't take place due to a last minute change.")
- **Economic considerations** ("Significant uncertainty around budget." "Audience demand and comfort returning.")

ORGANIZATIONS

Planned Venue Capacity

For events taking place between Nov 2021 and Feb 2022, what attendance capacity are you planning for?



What We See

At the time of this survey, capacity restrictions have been lifted for indoor venues in most regions of the province. **40%** of respondents planning indoor (seated) events before February 2022 expect to open their doors to **75%** to **100%** capacity, compared to just **30%** of those planning indoor (not seated) events.

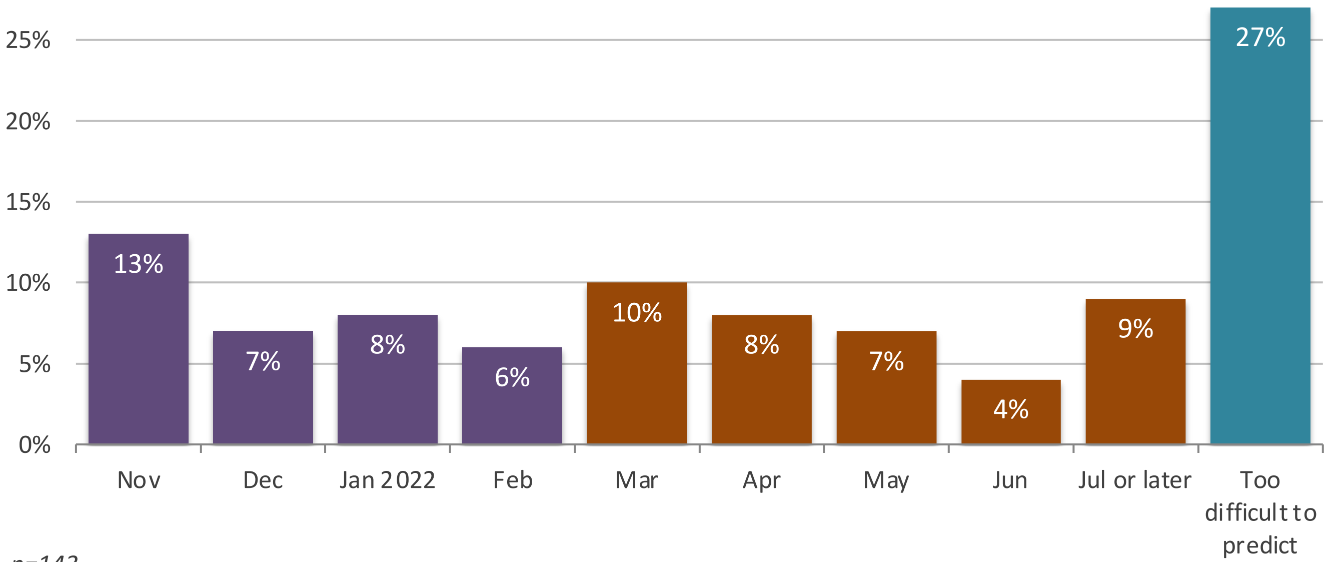
58% of those planning outdoor (not seated) events will have a capacity of **75%** to **100%.**

Note at the time of this survey, due to regional health restrictions (Fraser Health, Interior Health), a number of venues were restricted to a maximum of 50% capacity.

ORGANIZATIONS

Expected Return to 100% Capacity

When is the earliest you expect to have your INDOOR event(s) at 100% capacity?
(if health protocols allow and considering your patron comfort)



n=143

What We See

34% of respondents expect to return to 100% capacity **by February**.

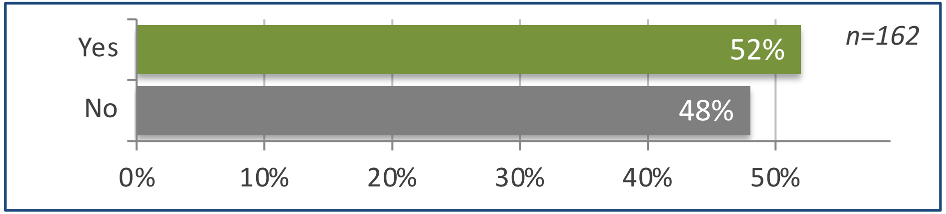
38% expect to return to full capacity **between March and July**.

27% find it **too difficult to predict**.

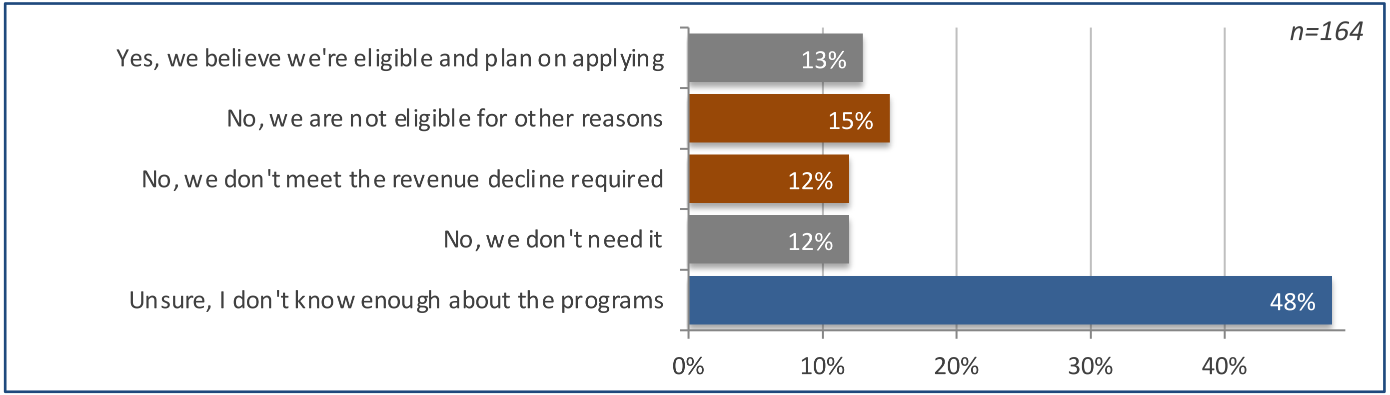
ORGANIZATIONS

Federal Supports

Did your organization access the federal CEWS and/or CERS programs?



Based on what you know about the new federal Tourism and Hospitality Recovery Program and Hardest-Hit Business Recovery Program, do you expect to access one of these two programs?



What We See

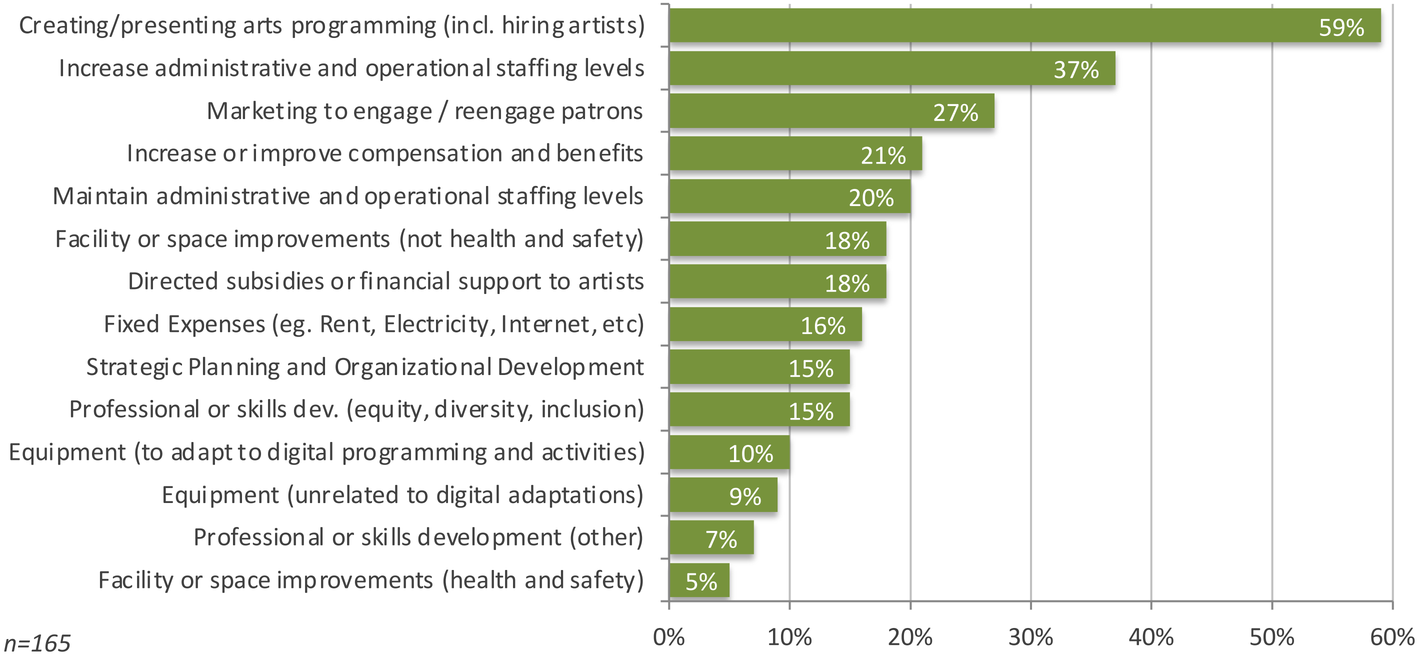
More than half (**52%**) of organization respondents **accessed** the federal CEWS or CERS programs**.**

75% either believe they are **ineligible** or are **uncertain** about accessing the new federal recovery programs for tourism, hospitality, and hardest hit businesses.

ORGANIZATIONS

Funding Scenario for Organizations

If a new unrestricted grant were available to you, what are the TOP THREE priority areas for which you would seek funding?



n=165

What We See

<u>Creation or presentation of artistic works</u> (**59%**) was the most popular priority area if unrestricted funding were available to organizations, followed by <u>increasing operational staffing levels</u> (**37%**).

Respondents could select up to three options.

ALL RESPONDENTS

Gaps in pandemic response programs and future support

What, if any, gaps have you found with the existing pandemic response programs, and what programs or support would you like to see in the future?

What We See

171 respondents shared gaps, barriers, and hopes for future support.

The majority (**90%**) identified funding-related challenges and hopes, including:

- **Access to relief funds (eg. CERB, CRB, CEWS, resilience):** "The end of CRB has put an insurmountable amount of stress on myself and my partner as it ended well before [programming could fully restart]"; "Our industry is not recovering at the same rate as other industries."; "For CEWS/CERS programs, [...] revenue shouldn't be the only eligibility factor."; "Funding has only been available to previous recipients."
- **Improved funding for artists and freelancers**: "More grant opportunities for low income artists."; "[There is] no program to specifically provide core funding for individual artists."
- **Supports for those who have barriers to accessing existing grant programs**: "Grants are so time consuming"; "More small grants with less restrictions."; "Artists with disabilities are pretty much ignored."
- **Advocating for Universal Basic Income**: "Consider a UBI for everyone to even the playing field."

Additional themes included:

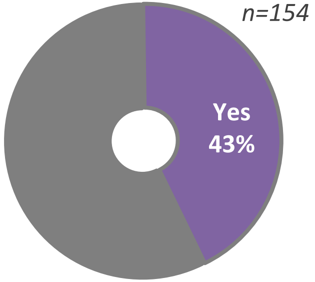
- **Improved communication between PHO and sector:** "PHO orders […] occasionally have contradictory references."
- **Mental health supports:** "mental health programs […] have been almost impossible to locate during the pandemic."

ORGANIZATIONS

Extended Health Benefits

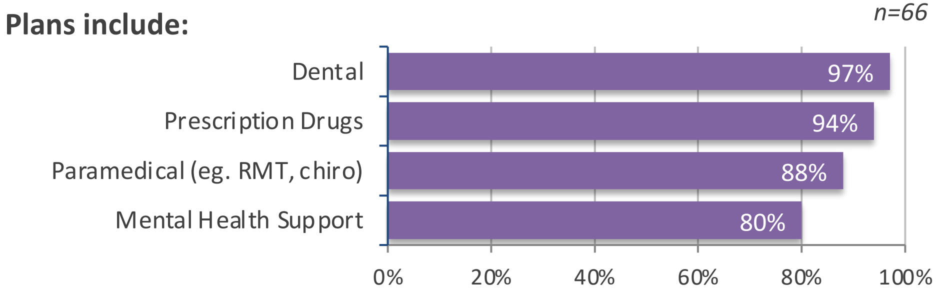
Do you offer an extended health plan for at least some of your workers?

Of the **154** respondents, **43% offer an** extended health plan to at least some of their workers.



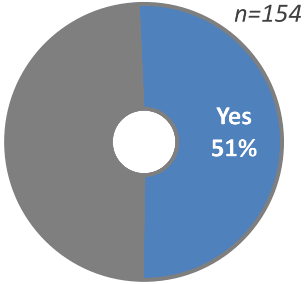
What We See

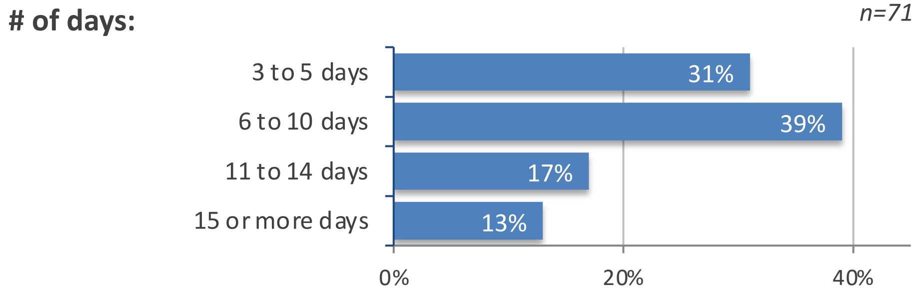
Less than half of respondents (**43%**) offer **extended health benefits** to their employees, while half (**51%**) offer **paid sick days**. **70%** of those who offer paid sick days provide **3-10 days**. Many respondents noted they don't have a policy, but time off is provided on a case-by-case basis.



Do you provide employees with paid days off for sickness or mental health?

Of the **154** respondents, **51%** provide employees with paid days off for sickness or mental health.





INDIVIDUALS

Extended Health Benefits

Do you currently have access to extended health benefits?

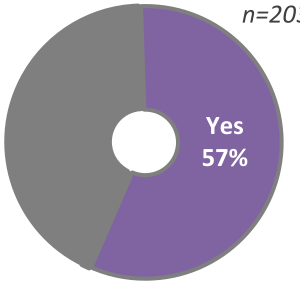
What We See

Of those who **have access** to extended health benefits, the most common **sources** include their employer (**31%**); or their spouse, partner or as a dependent (30%).

Less than **two-thirds** (**62%**) of the benefit plans include **mental health support**.

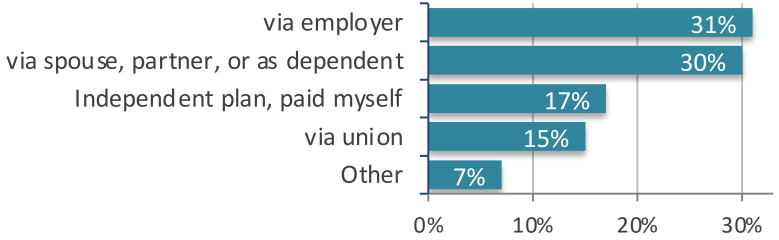
n=203

Of the **203** respondents, **57% have access to an** extended health benefits plan.



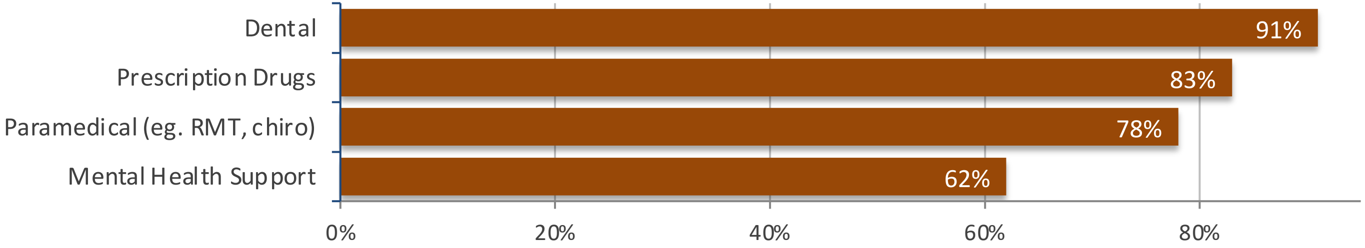
Source of the Plans:

n=115



Plans include:

n=114



ALL RESPONDENTS

Vaccine Passport

What impact will the BC Proof of Vaccination and BC Vaccine Card have on…

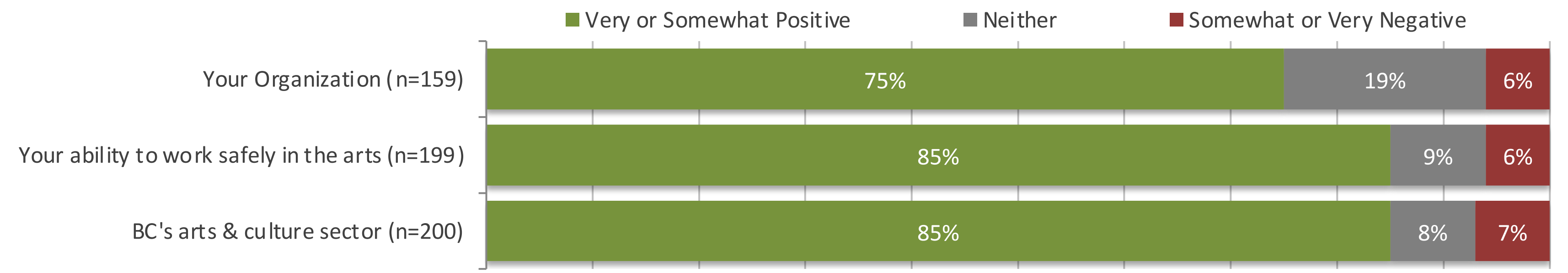
What We See

The overall impression of the B.C. Proof of Vaccine program and B.C. Vaccine Card is **positive** for organizations, individuals, and the sector. The most common positive sentiment is a sense of safety.

- “Made our artists and patrons feel more comfortable attending and performing in concerts.”
- “Folks come to gallery openings and more willing to come to workshops because they feel safer.”
- “I am immune compromised, knowing others are vaccinated allows me to perform at a venue without immense worry.”
- “Venues will be able to open up, which means more work for me.”
- “Working in a public-facing facility, I feel much safer.”

For those who reported a **negative** impact:

- “It has caused us to spend more on equipment and has altered our operations in terms of admittance significantly.”
- “I have a medical condition that does not allow me to get vaccine, […] affecting how I can work."

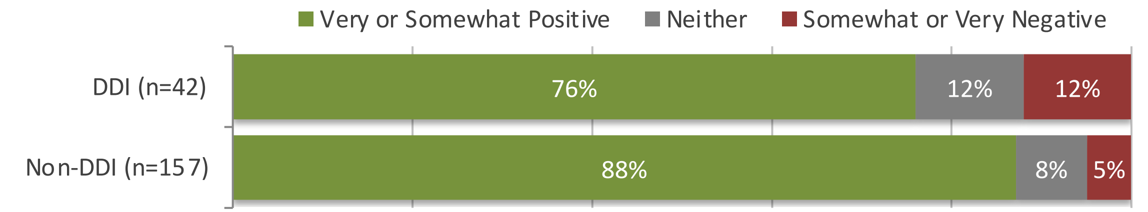


INDIVIDUALS

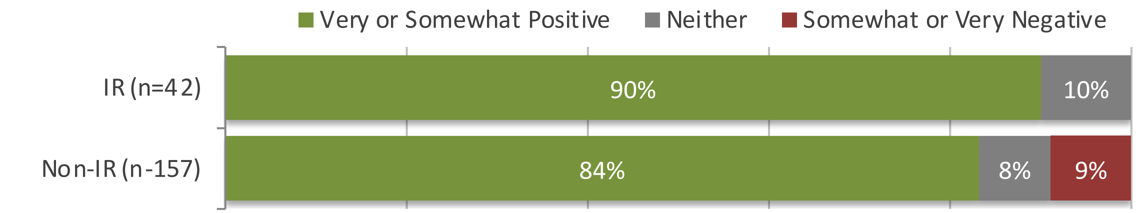
Vaccine Passport by Identities

What impact will the BC Proof of Vaccination and BC Vaccine Card have on your ability to work safely in the arts?

Deaf, Disabled, Impaired (DDI)* vs Non-DDI



Indigenous and Racialized (IR)~ vs Non-IR



What We See

A lower percentage of DDI individuals indicated the program impacts their ability to work in the arts in a **very or somewhat positive (76%)** way compared to non-DDI respondents (**88%**).

A higher percentage of IR respondents reported a **very or somewhat positive** (**90%**) impact compared to the non-IR respondents (**84%**).

**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.*

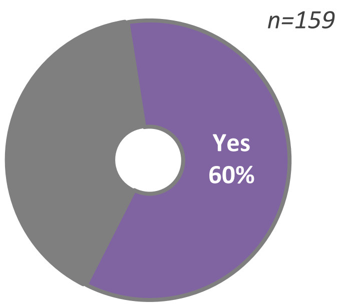
~Self-identified as First Nations, Inuit, or Métis; and/or Person of African, Asian, Middle Eastern, or Latin American descent, or mixed heritage that includes at least one of these groups.

ORGANIZATIONS

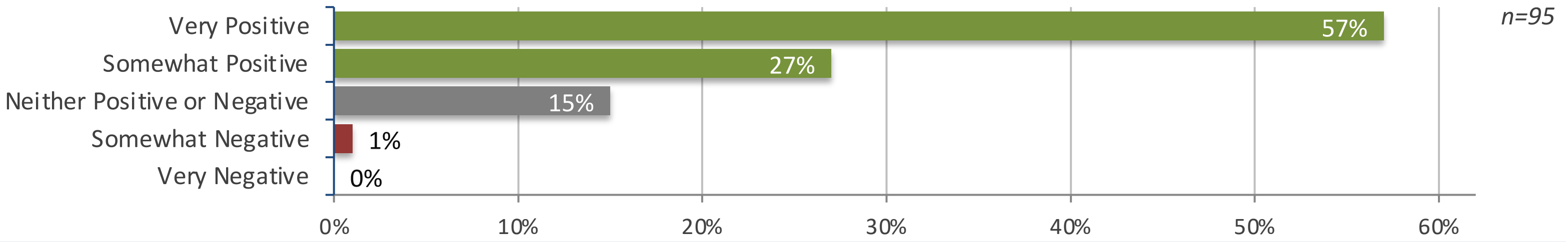
Internal Vaccine or Testing Policy

Do you have a policy that requires the vaccine or testing for staff, artists, workers, and/or volunteers?

Of the **159** respondents, **60% have a policy** in place.



What impact has your policy had on your organization?



What We See

84% of respondents who have an internal vaccine or testing policy in place indicate a **somewhat or very positive impact** on their organization.

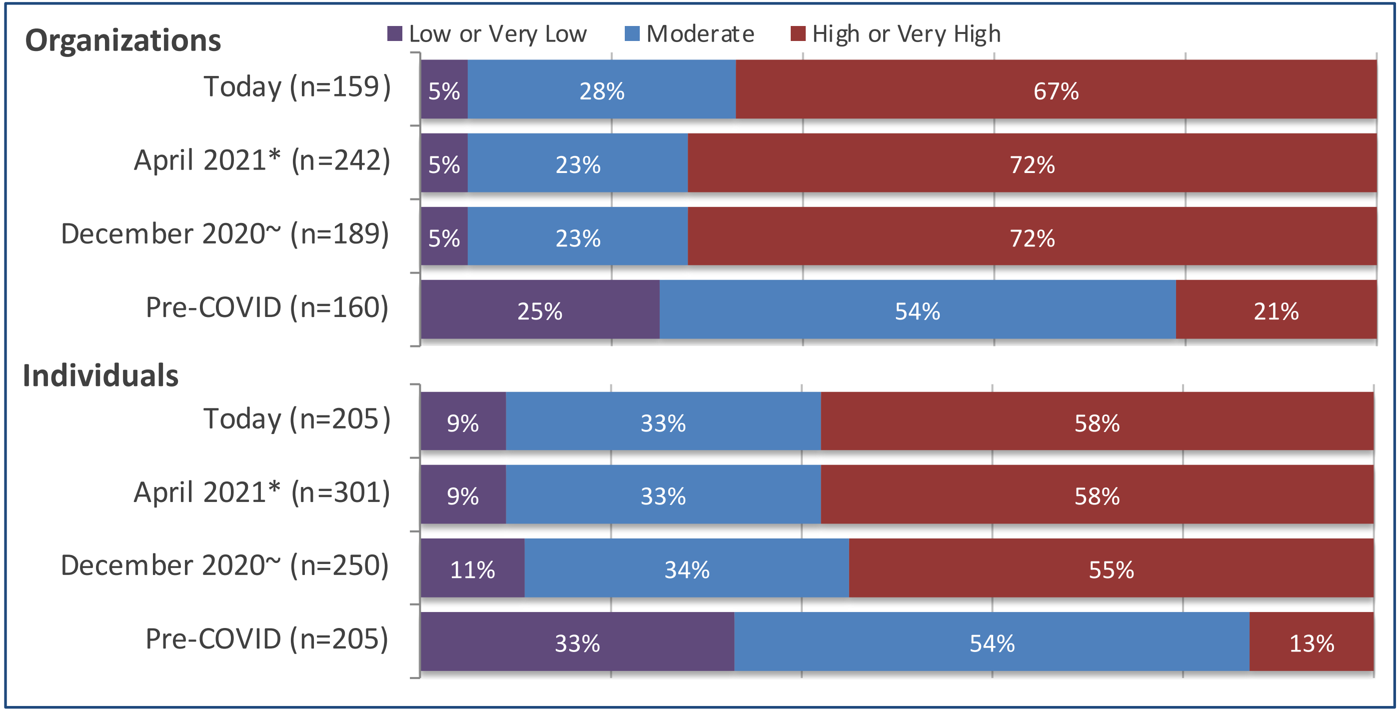
74% of the **positive** respondents shared that it has provided a safer and more comfortable environment for their team (eg. staff, crew, artists, volunteers, etc).

- "Gives everyone peace of mind they are around people who are vaccinated."
- "Volunteers have been eager to return based on our org-wide policy."
- "Less fear in the workplace so we can concentrate on our jobs."
- "It has allowed those of us who are vulnerable to feel safe enough to work."
- "Policy has increased confidence level for staff and artists."

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 continue to be high. Compared to individuals, a higher percentage of organization representatives reported **high or very high** levels of stress and anxiety.

Individuals percentages remain unchanged from April, while organizations reported a slight decrease in **high or very high** levels.

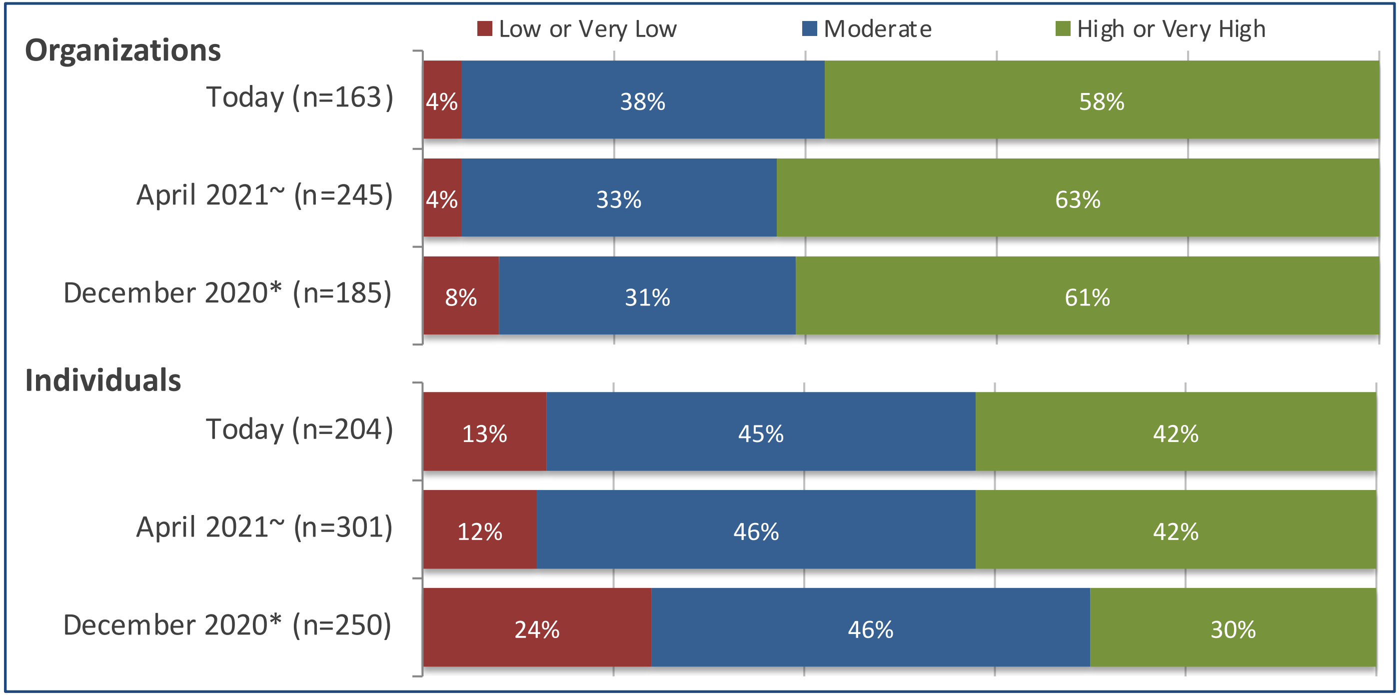
~December data is based on survey responses in the December 2020 report.

**April data represents survey responses in the April 2021 report.*

ALL RESPONDENTS

Self Optimism

How optimistic are you for **your organization** or **your arts work/arts practice's** ability to recover from the impact of COVID-19?



What We See

Overall, **optimism** for organizations and individuals remain consistent today compared to responses in April and December.

Individual artists and arts workers continue to be **less optimistic** about their own practice's recovery from effects of the pandemic compared to those responding on behalf of an organization.

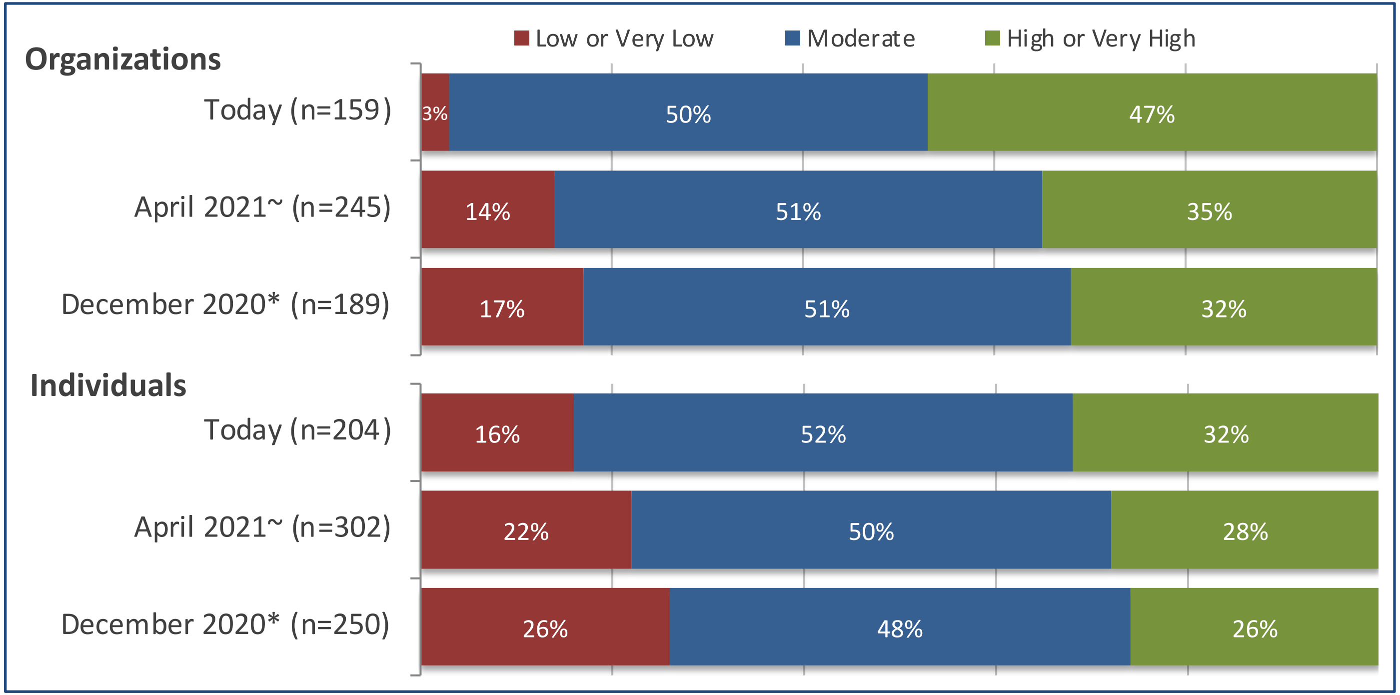
~April data is based on survey responses in the April 2021 report.

**December data represents survey responses in the December 2020 report.*

ALL RESPONDENTS

Sector Optimism

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



What We See

Organizations are **much more optimistic** (**97%**) about the arts and culture sector's recovery today compared to responses in April (**86%**) and December (**83%**).

Individuals also reported slightly **higher levels of optimism** today (**84%**) compared to April (**78%**) and December (**74%**).

~April data represents survey responses in the April 2021 report.

**December data is based on survey responses in the Dec 2020 report.*

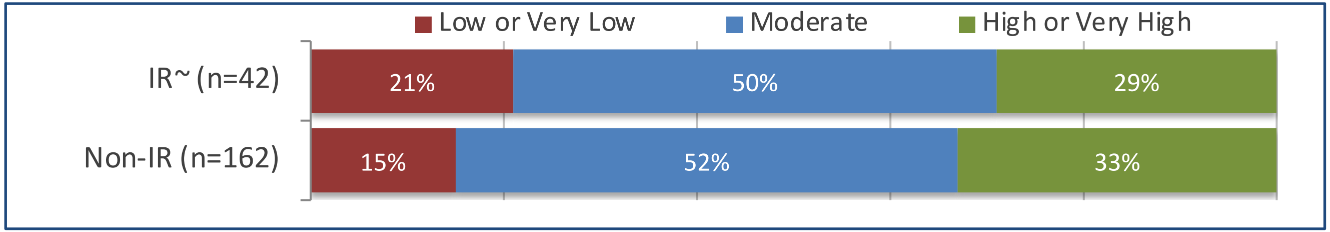
INDIVIDUALS

<u>Sector</u> Optimism by Identities

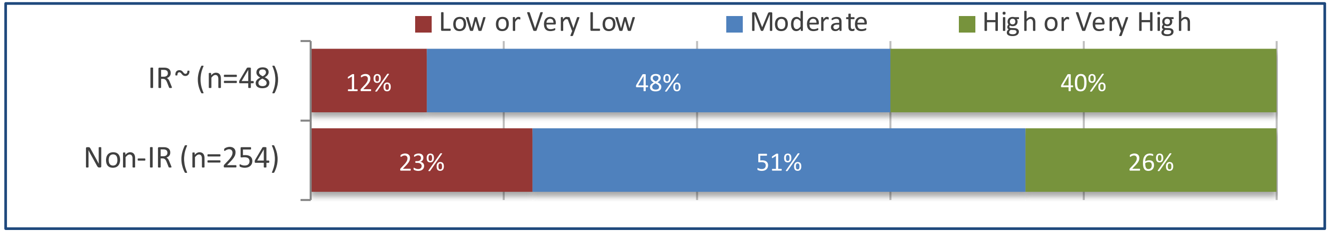
Indigenous and Racialized (IR)~ vs Non-IR

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

Current



April 2021



What We See

A lower percentage of <u>IR</u> individuals reported **high or very high** optimism (**29%**) about the arts and culture sector's recovery, compared to <u>non-IR</u> respondents (**33%**).

Today's percentage is lower than the reported optimism of IR respondents in April (40%), a decrease of 11 points.

~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.

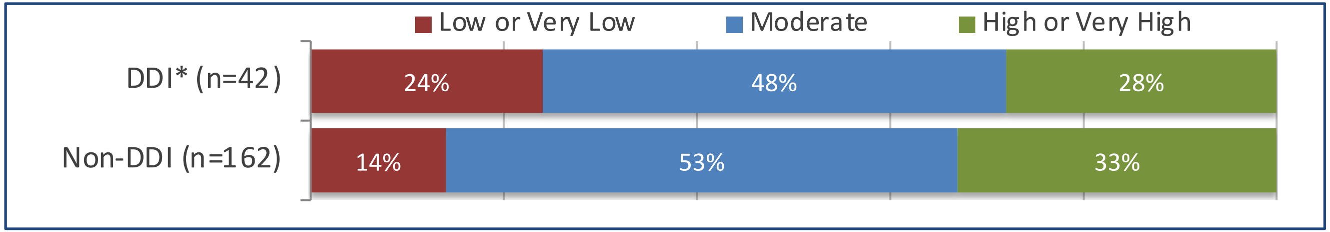
INDIVIDUALS

<u>Sector</u> **Optimism** by Identities

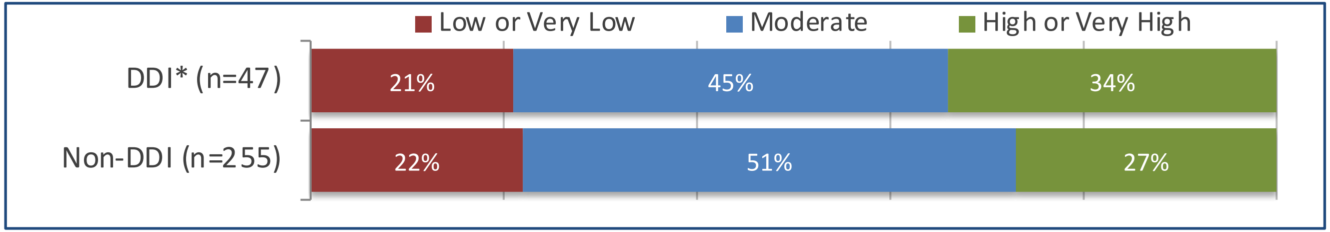
Deaf, Disabled, Impaired (DDI)* vs Non-DDI

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

Current



April 2021



What We See

A higher percentage of <u>DDI</u> individuals reported **low or very low** optimism (**24%**) about the sector's recovery, compared to <u>non-DDI</u> respondents (**14%**).

Today's percentage of **low or very low** optimism is also higher in comparison with responses from DDI individuals from the April 2021 report (**21%**).

**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.*

All Respondents

Takeaways

What's one thing you learned within the past 18 months that will inform decisions you make moving forward?

What We Heard

237 responses were received for this questions. Here are a selection of takeaways:

- Less is more. We can create less content and still have big impact in the community.
- I will not be going back into my industry with a mindset of "the show must go on" or the mindset that I must sacrifice my joy, personal life, and mental health for the show.
- I am realizing that positions in the arts community are unable to pay a livable wage for myself as a new mother.
- Are we providing a safe and healthy environment for our patrons and artists?
- I don't need to live in the city.
- Listen to your patrons! They'll tell you what you/they need.
- Hybrid digital/in-person events are the future but require a great deal of equipment, training, and prep.
- Self care takes work.
- I live in privilege.
- Government funding remains advantageous to larger mainstream organizations, but not to smaller racialized organizations that often bear the brunt of supporting anti-racism programs and content that benefit the community.
- I don't need that many people in my life.
- My employer can't be counted on to help me very much. I have to advocate for myself.
- Being nimble is the best survival strategy I have learned in 40 years of producing.
- Life is more important than work.
- The need to invest heavily in human resources to create an adaptive team became more apparent when programming ceased.
- I'm not open to maintaining the same level of work/life imbalance that I did for the past 30 years.

All Respondents

More Takeaways

What's one thing you learned within the past 18 months that will inform decisions you make moving forward?

Here are more takeaways

Digital programming can work or not work well.

Collaboration is key.

That are arts sector is unsustainable and it might be time for me to leave if it doesn't change.

Take time to listen.

Relationships and family are paramount, but for me, music is a life saver.

People really are the most valuable resource.

Teamwork and networking with other colleagues and similar organizations has been a lifesaver.

I don't really know how to reconcile the needs of funders and the needs of staff, or how it will inform my decisions, but it's something I'm thinking about.

I will stop saying yes to projects I don't like just because I want the experience or money...there are other ways to obtain both.

Many staff members are unable to adapt or pivot/take on new roles. We build our teams very specifically to perform distinct functions and more cross training is needed.

The limiting structures in place that make growth and development such a challenge in this sector.

Social media has its limits.

Centre the organization and all decisions in JEDI values to produce a more vibrant, relevant, artistically interesting, and more fulfilling organization.

Pay living wages!

Prioritize relationships over outcomes!

I should not trust able bodied people with my safety, care, or artistic work.

The precarity of the freelance independent artist. Any actions moving forward will be entirely of my own volition.

It is okay to bend / shift / adapt when things don't feel right.