B.C. Arts, Culture, and Heritage Sector Insights Report

Fall 2023

Prepared by

GVPTA Greater Vancouver Professional Theatre Alliance

On behalf of the B.C. Coalition of Arts, Culture, and Heritage

December 6, 2023

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Backgrounder

The **B.C. Arts, Culture, & Heritage Sector Insights** survey was developed in order to help us better understand, advocate, and inform government, funders, and stakeholders on the current state of the sector.

The survey and this report was led by the Greater Vancouver Professional Theatre Alliance (GVPTA), on behalf of and in collaboration with **a coalition of B.C.-based arts, culture, and heritage service organizations** that represent thousands of arts, culture, and heritage organizations and individuals across B.C., in every community and region. This includes hundreds of cultural businesses, venues, festivals, consultants, and independent practitioners, as well as thousands of professional artists, cultural practitioners, and volunteers throughout the province.

Coalition members include: 221A ● Arts BC ● Arts Council of the Central Okanagan ● BC Alliance for Arts + Culture ● BC Museums Association ● BC Music Festival Collective ● British Columbia Choral Federation ● British Columbia Touring Council ● Canadian Alliance of Dance Artists/West Chapter ● Canadian Artists' Representation/le Front des Artistes Canadiens – National ● Canadian Artists' Representation/le Front des Artistes Canadiens – BC ● Canadian Music Centre, BC ● Conseil culturel et artistique francophone de la C.B. ● Craft Council of BC ● Dance West Network ● Federation of British Columbia Writers ● Greater Vancouver Professional Theatre Alliance ● Heritage BC ● New Works ● Richmond Arts Coalition ● Rural Arts Inclusion Lab ● Sector Equity for Anti-Racism in the Arts ● Theatre BC ● Vancouver Musicians Association, Local 145 of the AFM ● Vines Art Society

Backgrounder (continued)

Who was invited to complete the survey?
Individual artists, workers, and practitioners, along with representatives of arts, culture, and heritage organizations from across British Columbia.

How was the survey distributed?
The survey link was distributed through the Coalition network, by funders and other community stakeholders via social media, newsletters, and direct email outreach to previous sector research survey participants.

The online survey responses were collected between November 3-22, 2023.

Questions about the survey or report can be directed to GVPTA executive director, Kenji Maeda at kenji@gvpta.ca.

Report Considerations

- The survey was only conducted online and in English.
- Many individuals face challenges that impact their capacity and ability to fill out a survey during the open dates.
- This report includes reflections and experiences of 431 survey respondents, and is not intended to be a representation of *every* individual and organization who make up the community. This report does not weight the survey data based on population or demographics.
- When comparing demographic or regional differences, the smaller sample size will affect the percentages, but we still felt they were important to include and recognize.
- Most questions within the survey were optional. Data in this report notes the number of responses ("n") for the question or response option.
- A summary of the narrative responses to open-ended questions were interpreted through the lens of the research lead, Kenji Maeda.
- Only one completed survey per organization or individual was accepted.

Report Highlights

About the Respondents

- Of the 431 respondents, 63% were individuals, and the other 37% responded on behalf of an organization.
- Of the 272 Individual respondents, 46% identified solely as an artist, 25% solely as an arts, culture, heritage worker, and 29% identified as both.
- 66% of the respondents were based in Metro Vancouver, 15% from Vancouver Island and Gulf Islands, and the remaining 19% from other areas of the province.
- The top five disciplines represented by Organization respondents included: Theatre (33%), Community Arts (31%), Museums & Heritage (29%), Music (26%), Visual Arts (25%).
- The top six disciplines represented by Individual respondents included: Visual Arts (36%), Theatre (35%), Music (19%), Community Arts (19%), Multidisciplinary (18%), and Museums & Heritage (19%).

Individuals

Annual Income

- Nearly half (48%) of the respondents expect to make less than $30,000 this year - not a living wage based on the Living Wage for Families B.C.'s November 2022 rates for 2023.
- More than half (56%) of the respondents expect their income to be primarily (80-100%) from work within the sector.
- One-third (33%) shared that their current cash flow situation is somewhat or very unstable.

Housing

- Most (85%) said that their current housing situation is very or somewhat stable and secure. At the same time, nearly one-third (32%) indicated their housing situation is somewhat or a lot less secure compared to five years ago.
- 64% of respondents shared that more than 30% of their annual income goes toward their rent or mortgage.

Report Highlights

<u>Individuals (continued)</u>

Working in the sector

- Individuals who identify solely as an artist consistently expect to be working in the arts, culture, and heritage sector over the next 18 months, ranging from 83% to 89% somewhat or very likely. Workers who are not artists, however, are more unsure about their time in their sector, with "very likely" sentiment dropping from 77% in early 2024 to 54% anticipating working in the sector in 18 months.

Obstacles

- Three of the top four *recent* obstacles experienced by individuals were related to their health: stress (68%), work/life balance (57%), health and safety concerns (47%). Cashflow and managing debt (58%) was the second most identified obstacle.
- When thinking about *anticipated* obstacles over the coming months, the most common included: cashflow and managing debt (48%), stress (39%), and work/life balance (32%).

Obstacles

Comparing Men / Women / Gender Minority*

- In the case of *recent* obstacles, gender minority individuals were 10-15 points higher than those of men and women across six reported categories, including stress, managing cash flow, and accessing government support programs.
- For *anticipated* obstacles over the coming months, a higher percentage of men (⬆10ppt) identified work/life balance, compared to others; a higher percentage of women (⬆5ppt) identified shortage of work opportunities, compared to others; a higher percentage of gender minority respondents (⬆10-16ppt) identified inability to access work space, loss of government support programs, and uncertainty of government responses, compared to others.

**"Gender Minority" includes individuals who selected an option other than exclusively "Man" or "Woman", including but not limited to non-binary, transgender, and two-spirit.*

Report Highlights

Individuals (continued)

Obstacles

Comparing: Deaf, hard of hearing, blind, low vision, wheelchair or mobility aid users

- Compared to individuals who are *not* Deaf, hard of hearing, blind, low vision, wheelchair or mobility aid users, a higher percentage of individuals who are Deaf, hard of hearing, blind, low vision, wheelchair or mobility aid users experienced recent challenges related to cash flow (⬆20ppt), accessing equipment (⬆20ppt), accessing government support programs (⬆17ppt), and health and safety concerns (⬆16ppt).

Comparing: Neurodiverse

- Compared to individuals who are *not* neurodiverse, a higher percentage of individuals who identified as neurodiverse experienced recent challenges related to cash flow (⬆34ppt), inability to plan for the future (⬆20ppt), work/life balance (⬆19ppt), and inability to access work space (⬆16ppt).

Comparing: Living with a mental illness

- Compared to individuals *not* living with a mental illness, a higher percentage of individuals living with a mental illness experienced recent challenges related to cash flow (⬆25ppt), stress/shortage of energy (⬆24ppt), accessing government support programs (⬆21ppt), and inability to plan for the future (⬆19ppt).

Comparing: Living with a chronic illness

- Compared to individuals *not* living with a chronic illness, a higher percentage of individuals living with a chronic illness experienced recent challenges related to stress/shortage of energy (⬆32ppt), accessing government support programs (⬆19ppt), cash flow (⬆15ppt), and inability to access work space (⬆15ppt).

Comparing: Regions (health authority catchment area)

- The most significant differences came from the Interior region where a higher percentage identified safety concerns due to wildfires (⬆53ppt) and inability to plan for the future (⬆5ppt).

! *Note: For all categories on this page (does not include Regions) each respondent could identify as belonging to multiple categories. For example, a person could select both neurodiverse and living with a chronic illness.*

Report Highlights

<u>Organizations</u>

Governance and Structure

- Of the non-profit and charitable organization respondents, 65% have a governance board, 17% a working board, and 12% operating somewhere in between working and governance.
- When offered a selection of shapes, more than a quarter (29%) chose the interconnected dots to represent their decision-making structure. When asked to describe why they chose a particular shape or image, the themes of collaboration and sharing leadership was communicated across most of the image options.

Financial Stability

- Nearly a quarter (23%) of respondents are in a somewhat or very unstable cash flow situation. Common reasons for the instability include: increased expenses for programs, activities, rent, and general expenses; limited and loss of funding and fund development options; reduced earned and contributed revenue from number of patrons and ticket sales to sponsorships and donations.
- While 11% of respondents are assessing the situation, 17% are concerned their organization is at significant risk of insolvency, bankruptcy, or ceasing operations within the next 12 months. The most common reason cited for the risk was related to the inability to raise or secure additional funds to support the organization while also producing programs and activities with increased costs.

Venue and Space Stability

- Of the 86 organizations that operate a venue or facility used for programming and activities, 36% are a little or somewhat concerned about an unplanned loss of one or more of their spaces within the next year. 14% are very concerned.
- Of the 117 organizations with a dedicated office space, more than a quarter (27%) have some concern about an unplanned loss of that space within the next year.

Recovery Funds

- More than one-third (34%) reported relying on one-time recovery funding received this year from a public agency to keep them operating. More of those organizations accessed recovery supports from BC Arts Council (29%) than from any other agency.

Report Highlights

Organizations (continued)

Trends

Programs and Activities

- The vast majority of respondents (88%) reported that their programs and activities this year have stayed the same (40%) or increased (48%) compared to 2022. While looking toward 2024, half (50%) expect it to remain the same, while 36% anticipate an increase in the number or scale.

Human Resource Capacity

- While reflecting on changes in their human resource capacity, one-quarter (26%) of respondents had some or significant increase this year, compared to last year (2022), while one in five (19%) experienced a decrease. Expectations moving into 2024 are similar.

Ticket Sales and Attendance

- An almost equal percentage said they experienced positive (43%) or negative trends (41%) with their ticket sales or attendance. 16% said they experienced both positive and negative trends.

- Positive trends included: Return to pre-pandemic attendance levels; New audiences (eg. culturally diverse, wider age range); Increased demand for kids and youth educational programs (eg. day camps, field trips); Patrons purchasing tickets earlier than previous years.

- Factors that contributed to positive trends included: Thematic programming (eg. lighter, happier content; content tailored to target communities); Strong partnerships and collaborations with other organizations; Localized marketing and community engagement strategies; Outdoor activities and using spaces not typical for the organization; Shifting from online to in-person; Financial accessibility (eg. free and flexible pricing options); Patrons creating new routines and improved general sentiment toward attending events.

- Negative trends included: Slow recovery of attendance levels; More patron hesitancy for indoor activities compared to outdoor; Increase in the number of "no-shows" for purchased tickets; "Riskier" or unknown programming was harder to sell; Cancelled events and activities due to low ticket sales, or illness within staff, cast, or crew; More patrons choosing the cheapest tickets.

Report Highlights

Organizations (continued)

Trends

Ticket Sales and Attendance (continued)

- Factors that contributed to negative trends included: Increased inflation resulted in less funds for patrons to purchase tickets or register; Decreased programming and activities due to budget cuts, reducing visibility and consistency with patrons; Increased feeling of competition with other events and activities, with patrons' limited funds; Environmental (eg. wildfires) and geopolitical events impacted finances, personal energy, and mental health; Declining neighbourhood safety around event spaces; Lack of resources to expand or strengthen programs and activities; Difficulty reintroducing live events to some patrons who had been used to an abundance of online programming.

Obstacles

- Reflecting on *recent* obstacles they faced, the three most frequently identified were related to increased expenses, including human resources (71%), supplies and equipment (66%), and insurance (49%). Shortage of available volunteers (45%), reduced donations from patrons (41%) and uncertainty of government response (41%) were also shared by nearly half of respondents.
- For obstacles organizations *anticipate* facing over the coming months, the three most frequently identified were related to finances, including increased expenses for human resources (69%) and supplies and equipment (47%), followed by the inability or reduced access to government grants (44%).

Report Highlights

<u>**All Respondents**</u>

External Factors
When considering external factors that may directly impact their organization, or their individual work or practice, they were particularly or thinking about:

- Financial and economic downturn, including inflation, rising costs, and stagnant wages;
- Health and wellbeing, including COVID and other illnesses impacting staffing levels, shows, exhibitions, and activities;
- Political and government (at all levels) shifts in priority, including potential funding cuts;
- Environmental, including preparing for and responding to wildfires and other extreme weather events;
- Financial and housing instability for artists, workers, and community;
- Loss of or inaccessible infrastructure for creating and sharing;
- Global events and geopolitical tensions impacting community members;
- Ageism, racism, ableism, and other "isms" affecting access to participation, supports, services, and opportunities.
- (For organizations) Attracting and retaining qualified staff and volunteers;
- (For individuals) Fewer opportunities to maintain work or practice, with particular need to support at different stages of their career development.

We invited respondents to share questions, recommendations, and requests to be conveyed to Canada Council for the Arts, Funders, Government, and Community. Read those on pages 48-52.

Reflections on what's recently gone well or has been positive for individuals or organizations can be read on pages 56-57.

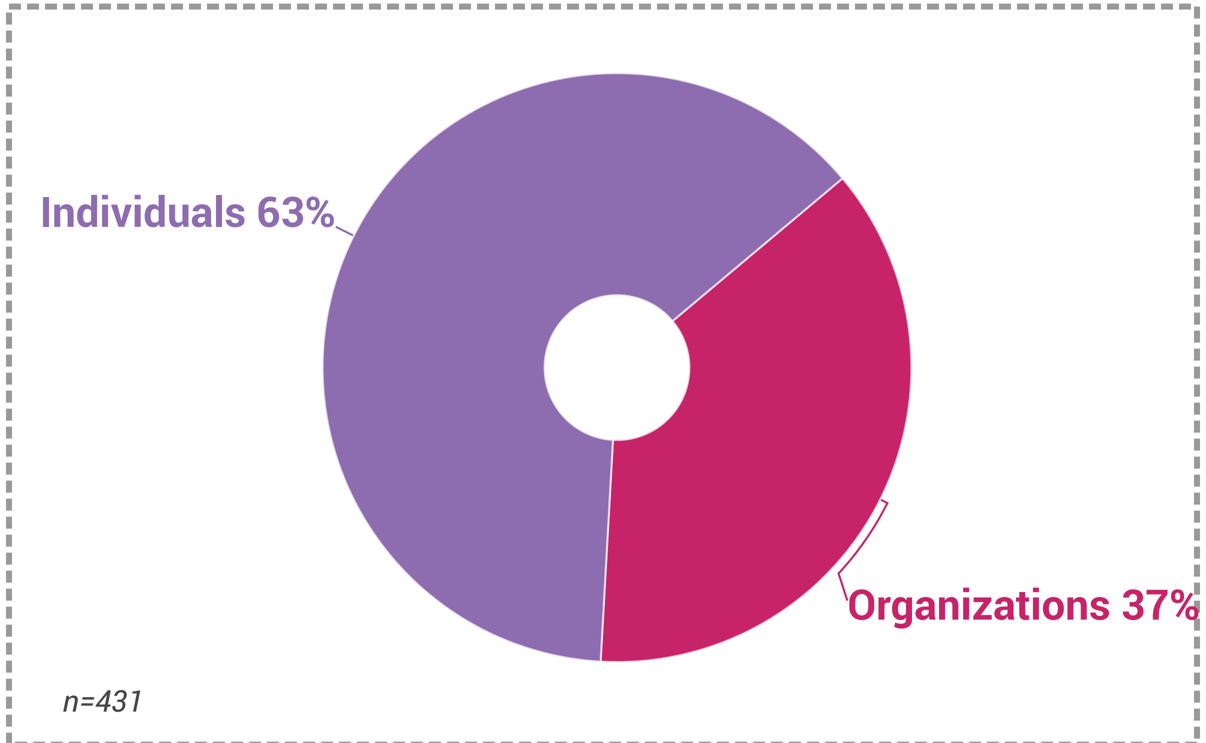
Who responded?

Who Responded?

The Respondents: Organizations vs Individuals

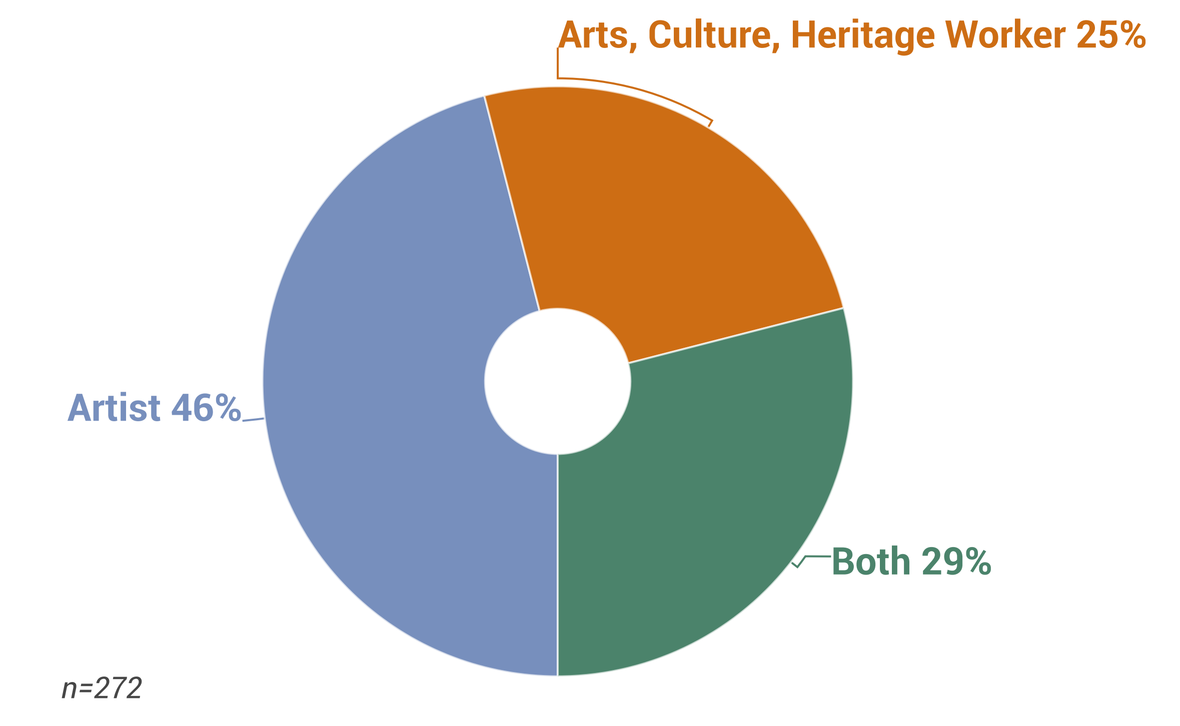
What we see

Of the 431 respondents, **63%** were **Individuals**, and the other **37%** responded on behalf of an **Organization**.



What we see

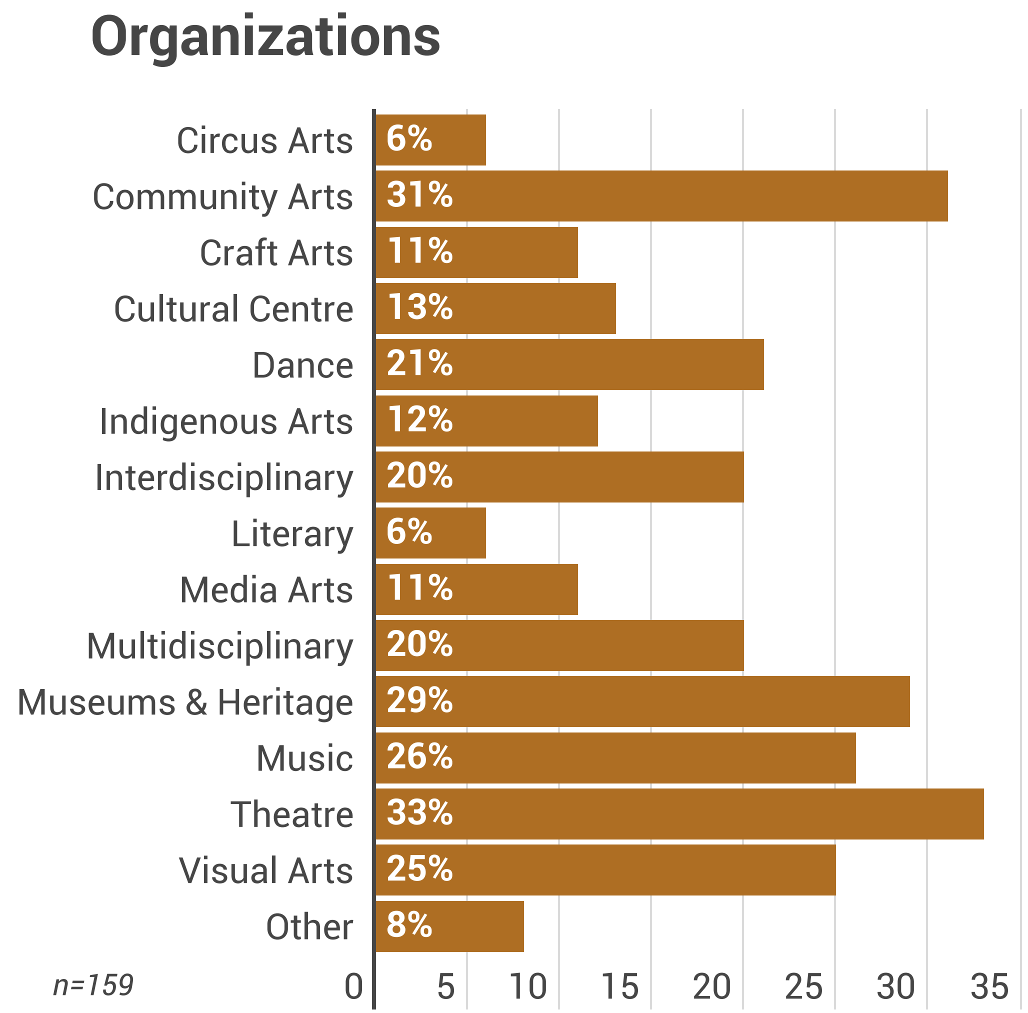
Of the 272 **Individual** respondents, **46%** identified solely as an **Artist**, **25%** solely as an **Arts, Culture, Heritage Worker**, and **29%** identified as **Both**.

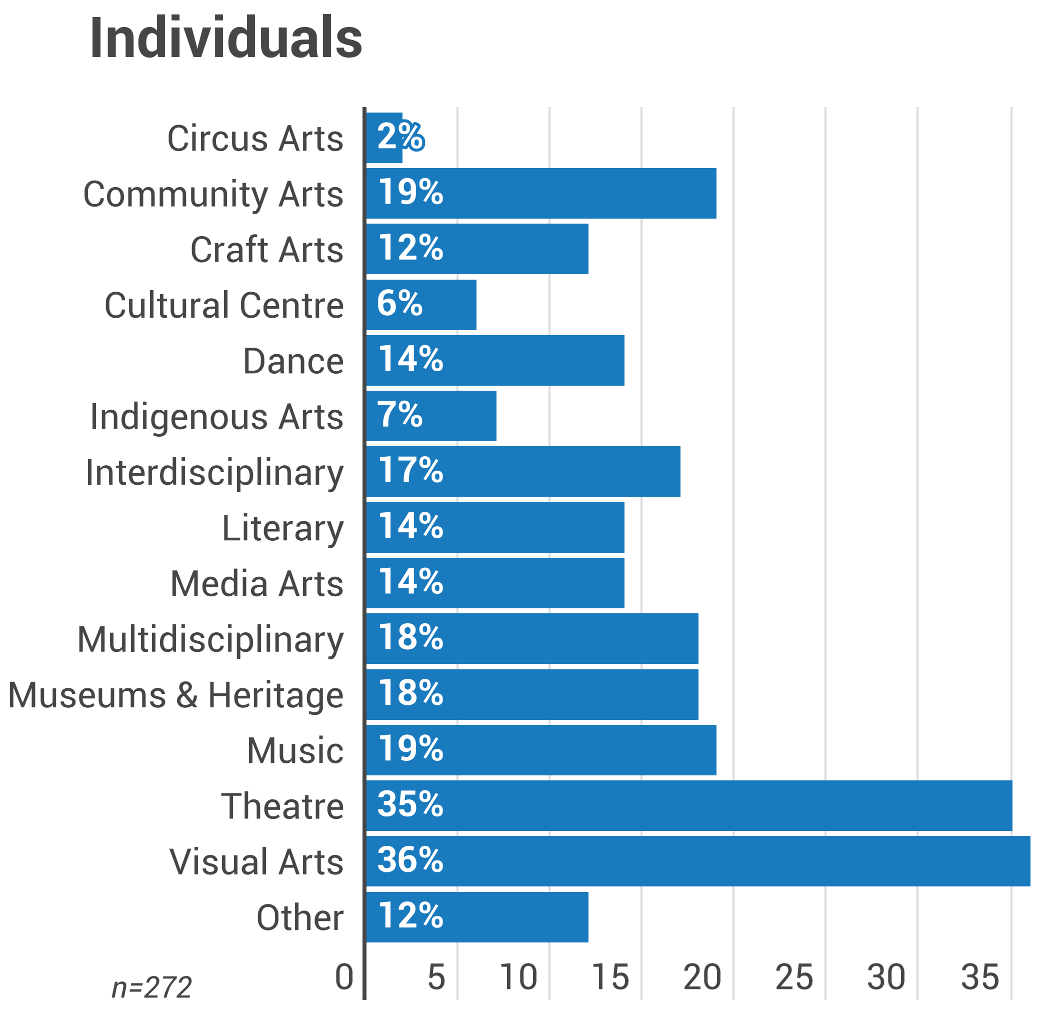


Who Responded?

By Discipline

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





What we see

All respondents were asked to identify their or their organization's primary discipline(s).

For **Organization** respondents, Theatre (**33%**), Community Arts (**31%**), and Museums & Heritage (**29%**) were selected the most.

For **Individual** artist and worker respondents, Visual Arts (**36%**) and Theatre (**35%**) are the most represented.

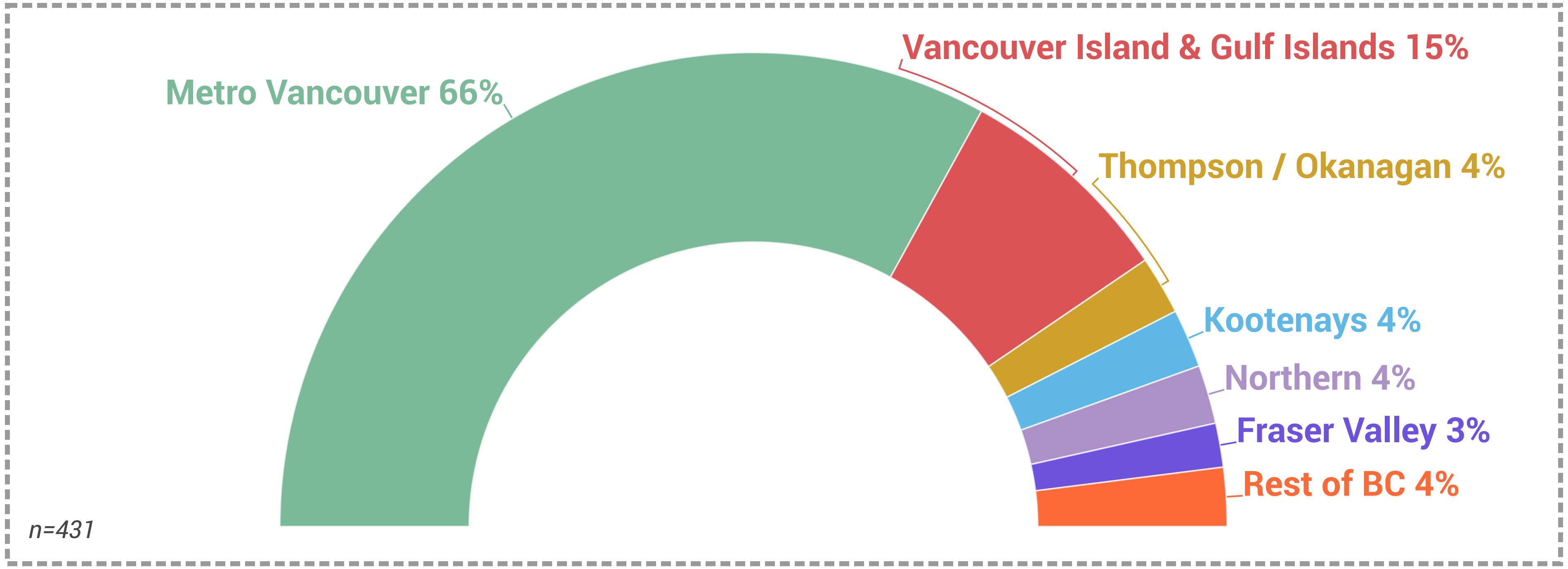
Who Responded?

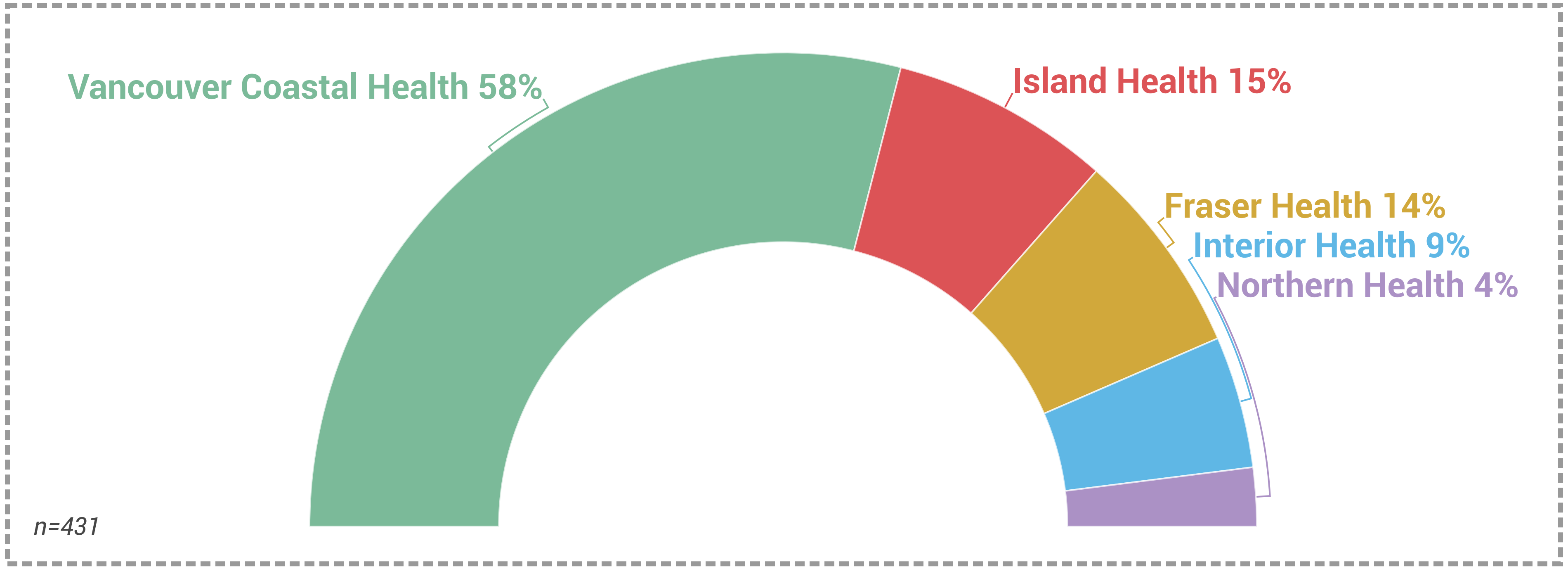
By Region

What we see

Of the 431 responses received, the region in BC with the most respondents was **Metro Vancouver (66%)**, followed by **Vancouver Island & Gulf Islands region (15%)**.

When reviewing the regional distribution based on Health Authority, the regions with the most responses included **Vancouver Coastal Health (58%)**, **Island Health (15%)**, and **Fraser Health (14%).**





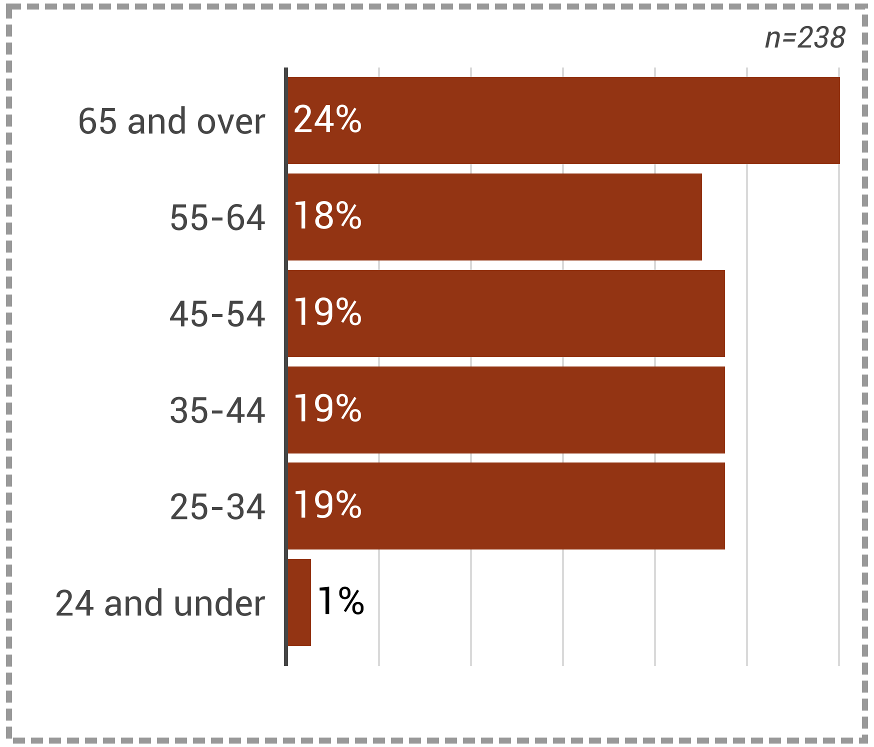
Individuals

Artists and Arts, Culture, Heritage Workers

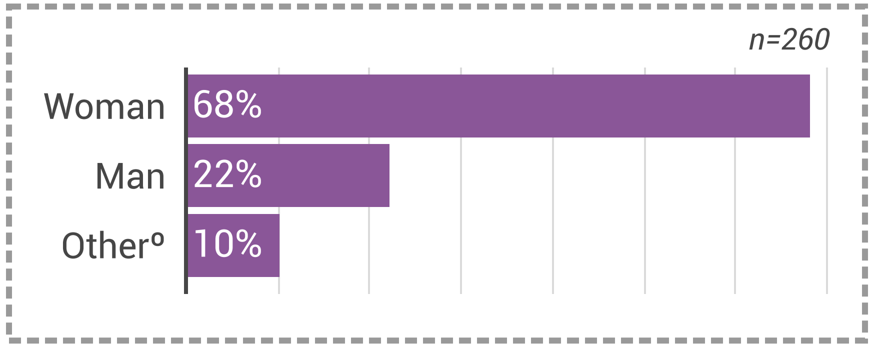
Individuals

Demographics

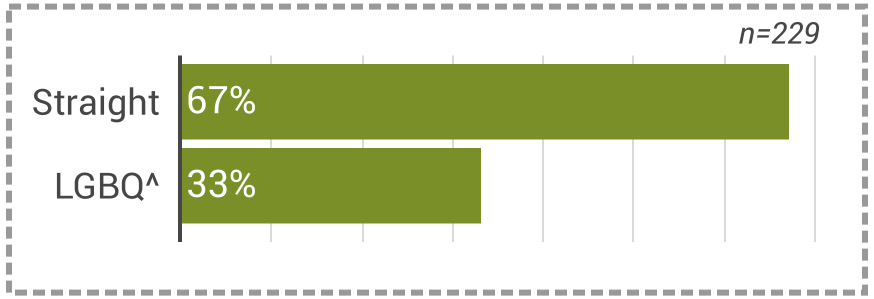
Age



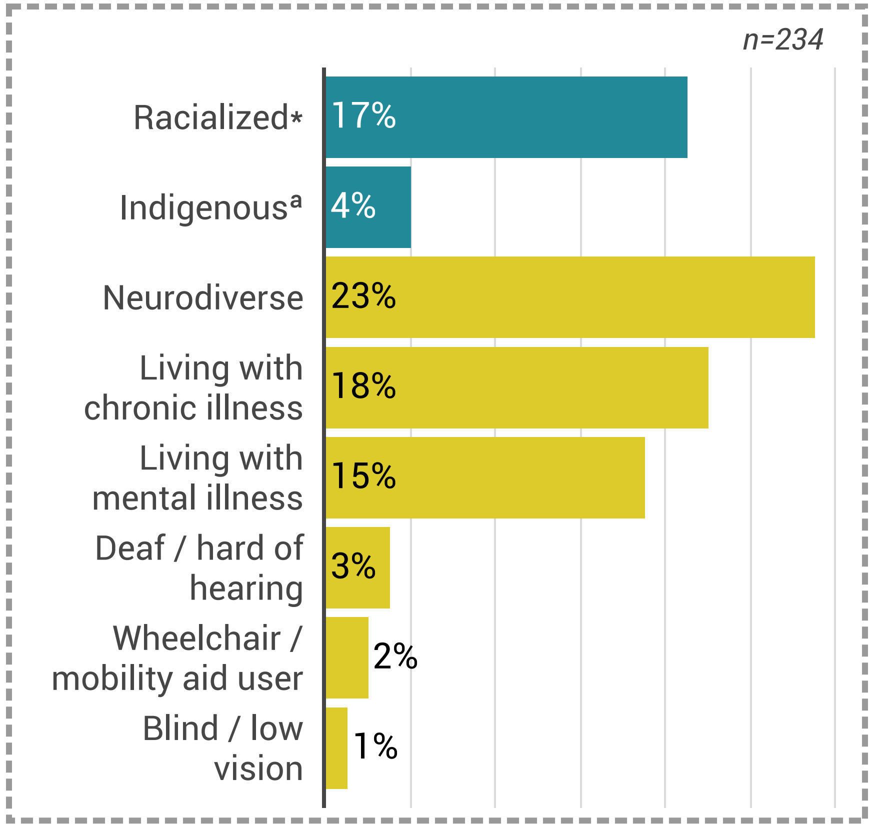
Gender



Sexual Orientation



Identify as...



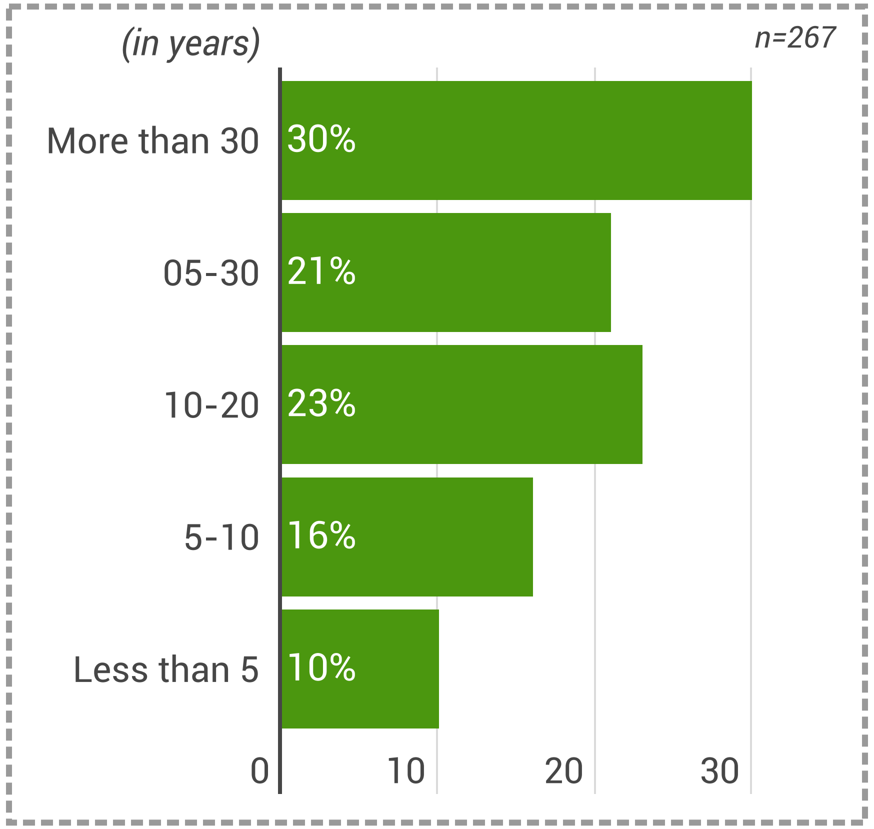
Note: Respondents could select multiple responses for questions related to gender, sexual orientation, and identity.

Other° *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*
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*
Indigenous[a] *Self identified as First Nations, Inuit, or Métis*

Individuals

Sector Experience

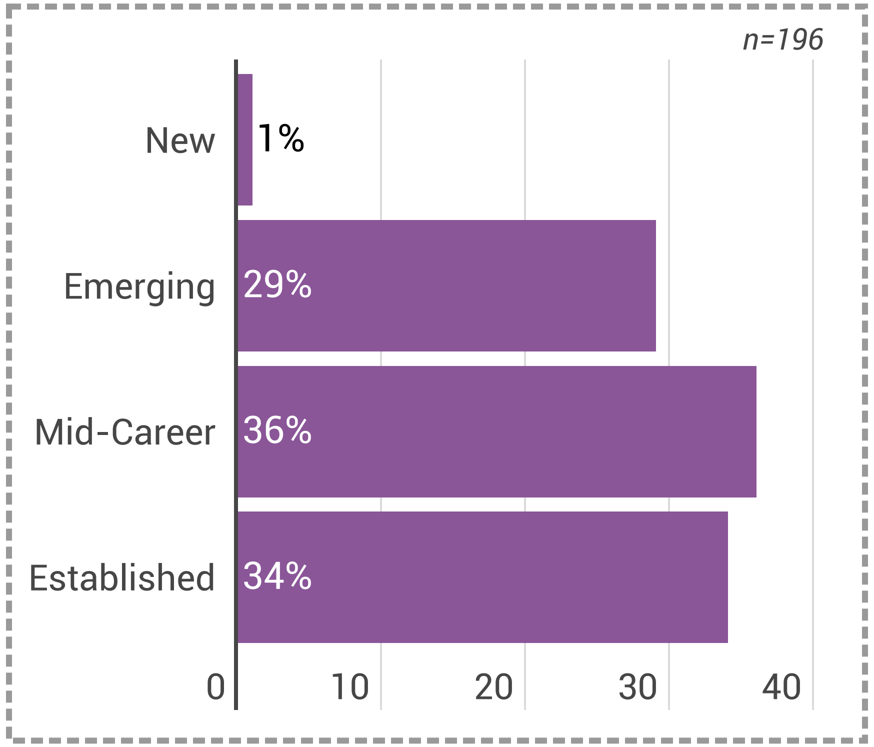
How many years have you worked in the arts, culture, heritage sector?



How would you self-identify your level of experience?

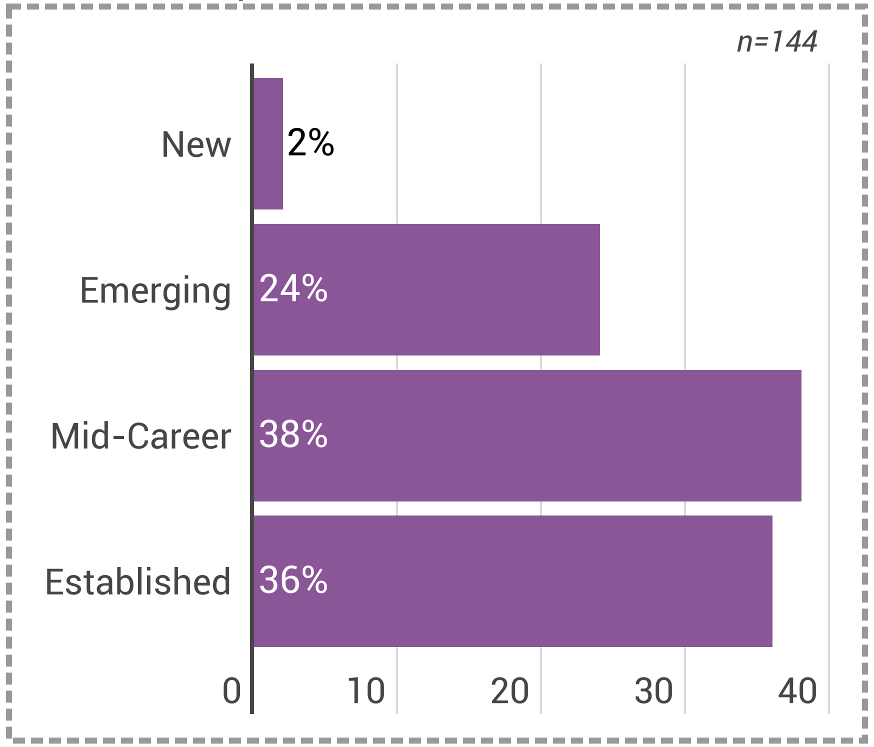
Artists

Level of Experience



Arts, Culture, Heritage Workers

Level of Experience



Individuals

Annual Income (2023)

(Not including government supports)

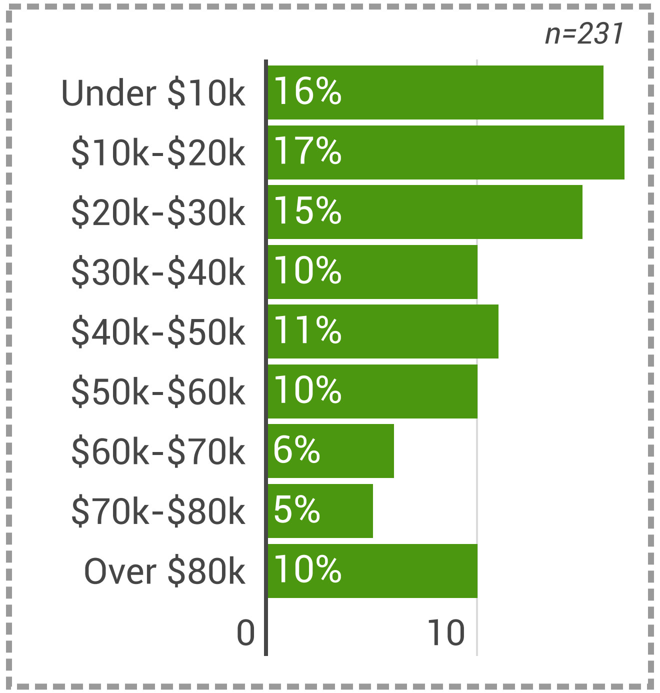
What we see

Nearly half (48%) of respondents expect to make **less than $30k** this year, which is not a living wage based on Living Wage for Families B.C.'s November 2022 published rates for 2023.

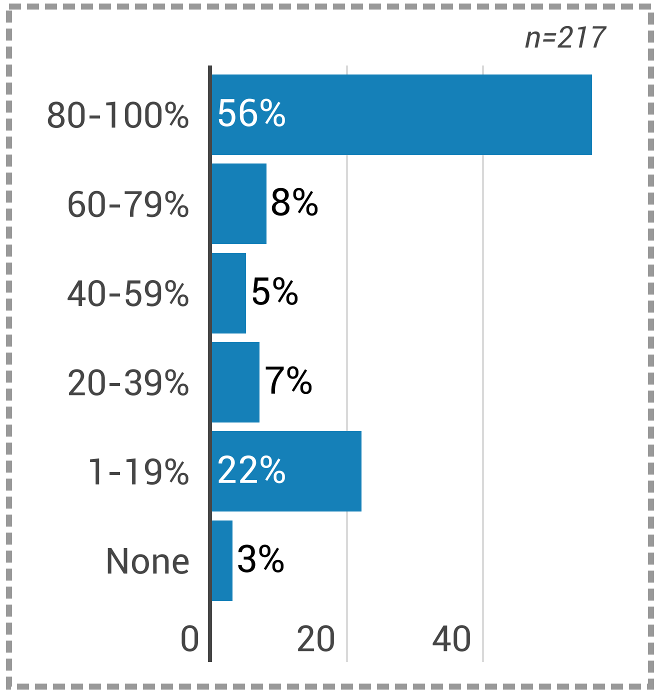
More than half (56%) of the respondents expect their income to be **primarily (80-100%)** from work in the sector.

One-third (33%) shared that their current cash flow situation is **somewhat or very unstable**.

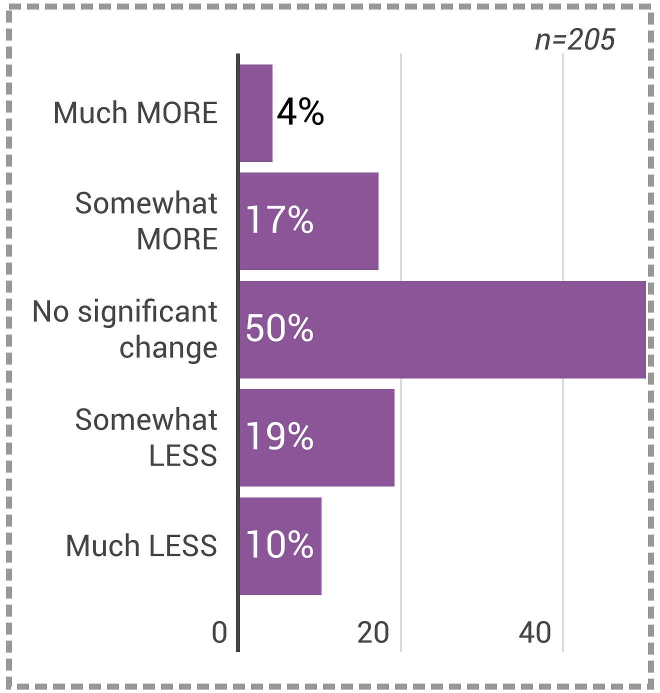
Projected 2023 Total Annual Income



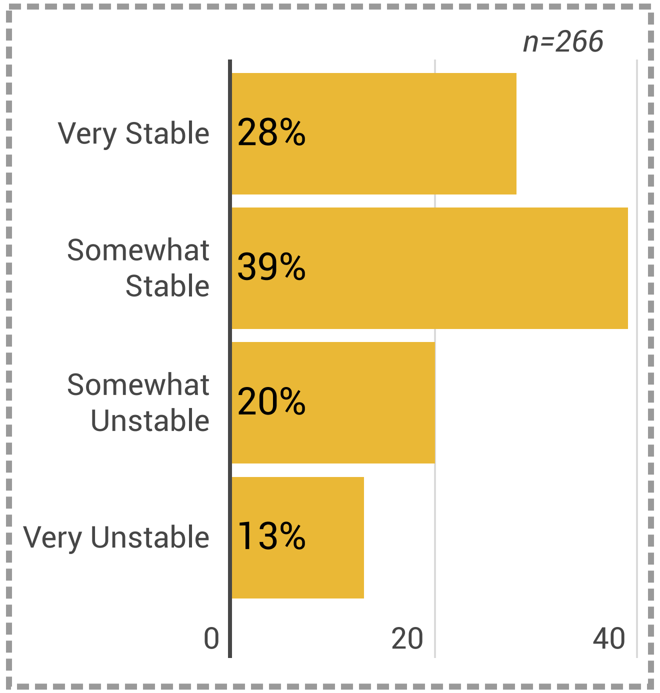
What percentage of your 2023 annual income will come from the arts, culture, and heritage sector?



How does the percentage of your income from the sector compared to last year (2022)?



How stable is your current cash flow?



Individuals

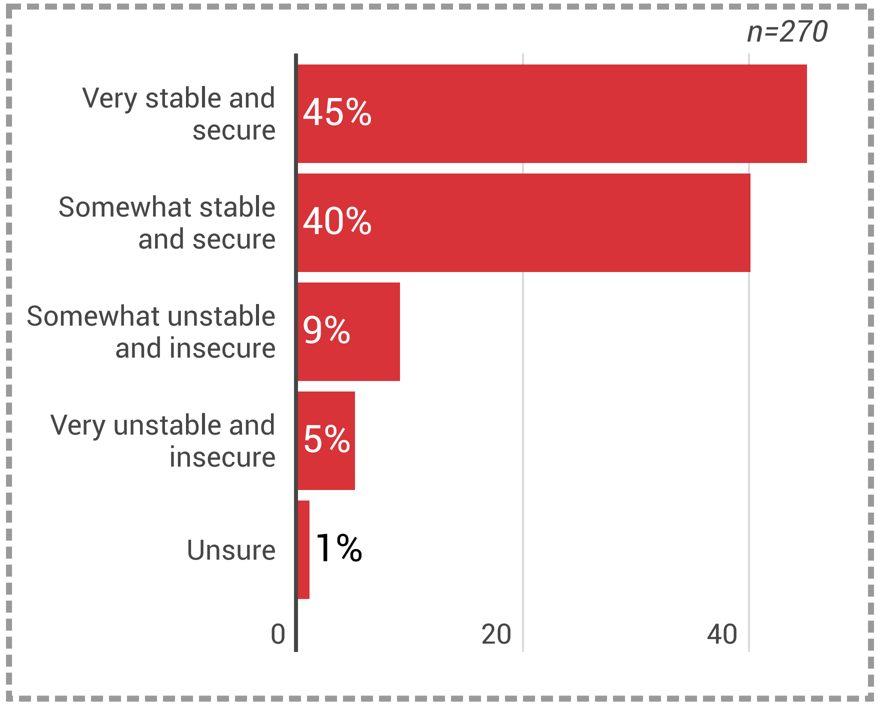
Housing

What we see

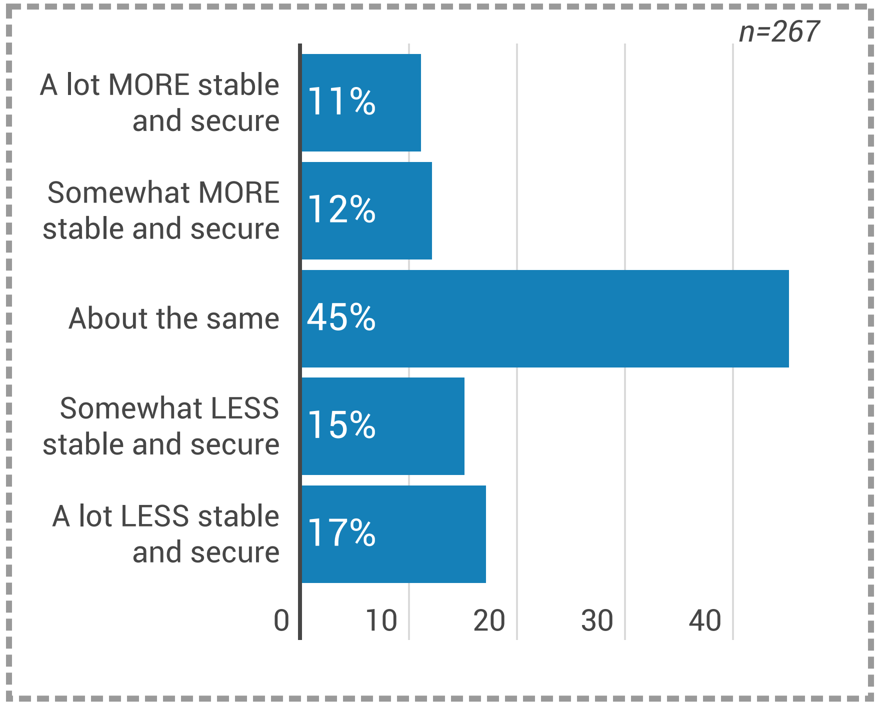
Of the 270 responses from Individuals, **85%** said that their current housing situation is **very or somewhat stable and secure**. At the same time, nearly **one-third (32%)** their housing situation is **somewhat or a lot less secure** compared to five years ago.

64% of respondents shared that **more than 30%** of their annual income goes toward their rent or mortgage.

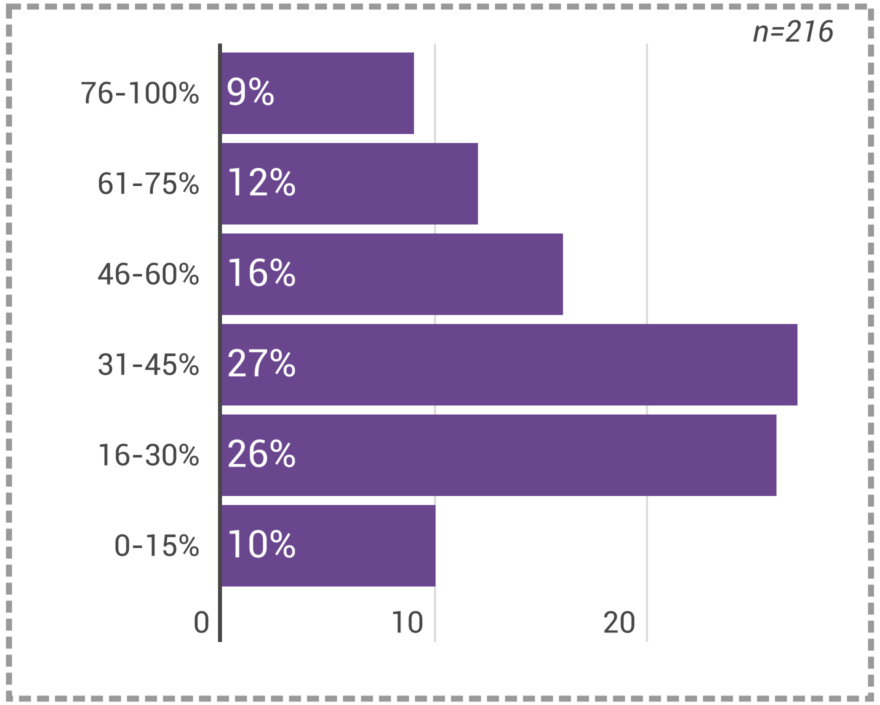
How stable is your current housing situation?



How much more or less stable and secure is your housing situation now compared to five years ago (2018)?

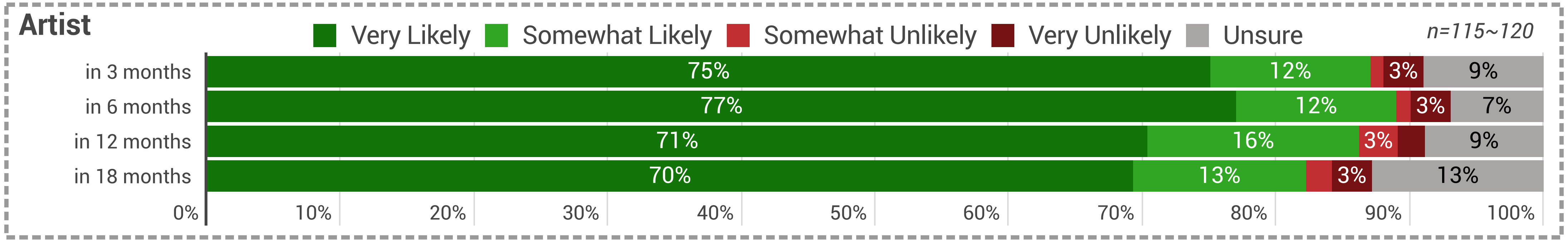


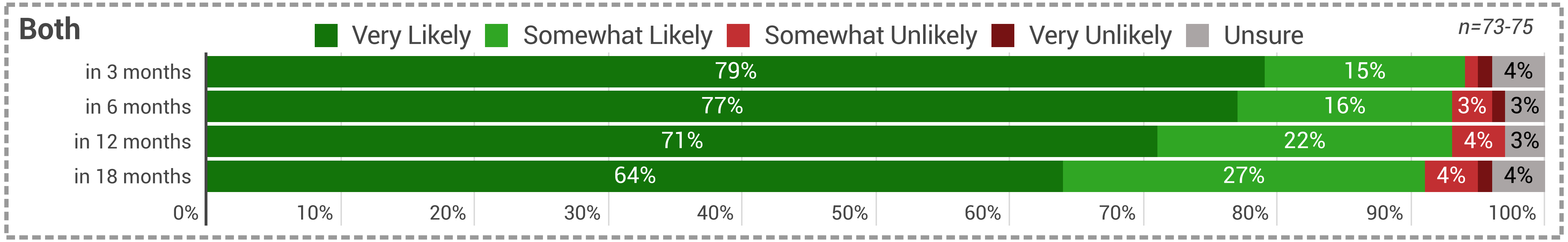
What percentage of your 2023 annual income will go toward your housing rent or mortgage?

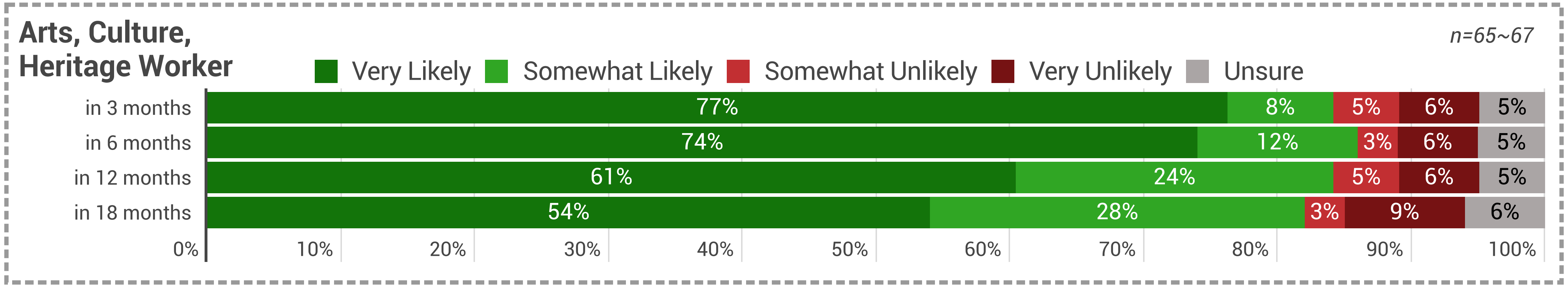


Individuals

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







What we see

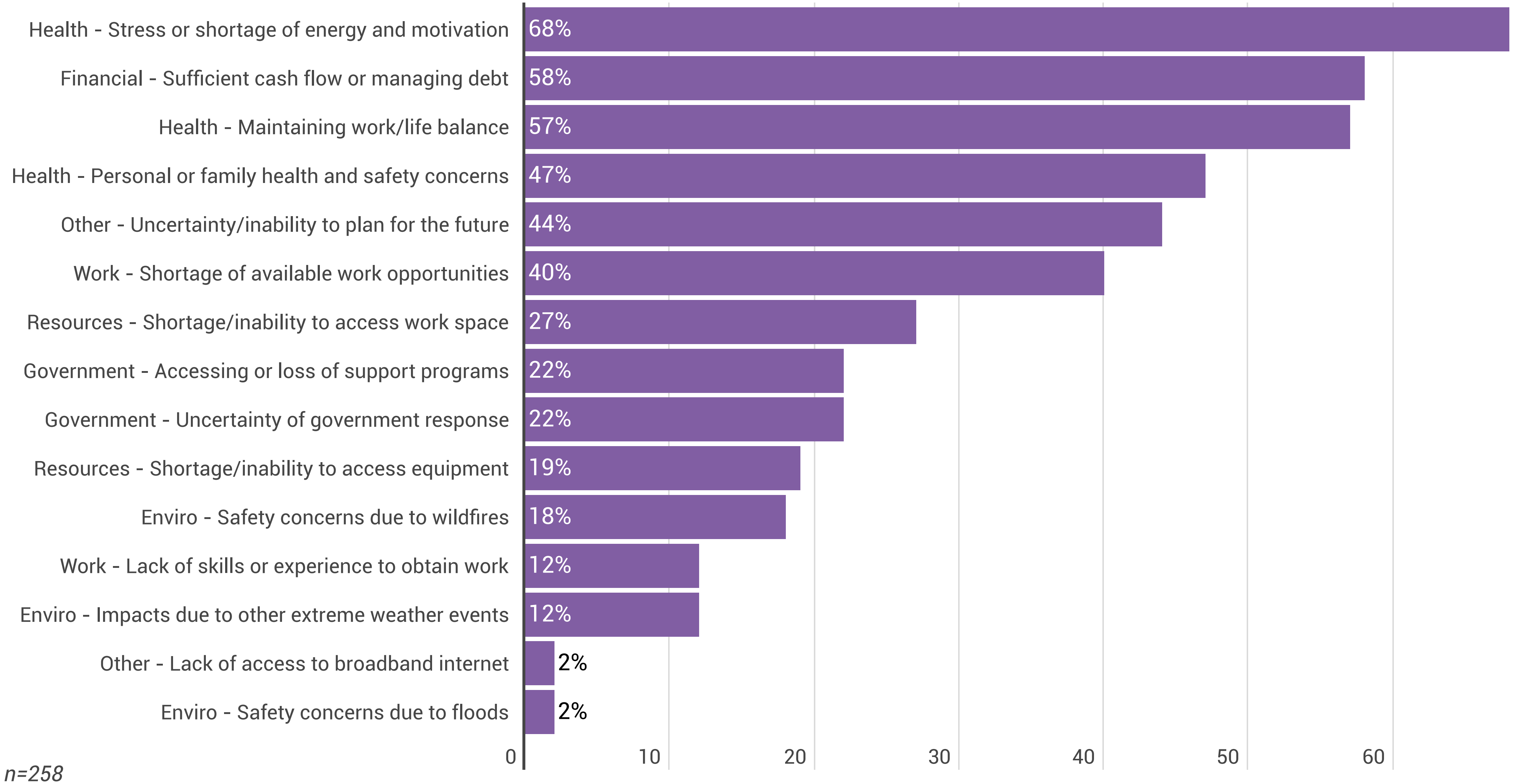
Individuals who identify solely as an **artist** consistently expect to continue working in the arts, culture, and heritage sector over the next 18 months, ranging from **83%** to **89%** **somewhat or very likely.**

While those who identify solely as an **ACH worker** or **both** have a consistent likelihood of working in the sector, both have a significant decline in **very likely** responses. **Worker** is down 17 points from **77%** in 3 months to **54%** in 18 months; **Both** are down 15 points from **79%** in 3 months to **64%** in 18 months.

Individuals

Recent Obstacles

Over the LAST SIX MONTHS, which of the following are obstacles you have faced?



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What we see

When reflecting on obstacles they faced over the past six months, three of the top four were related to health: stress (**68%**), work/life balance (**57%**), health and safety concerns (**47%**).

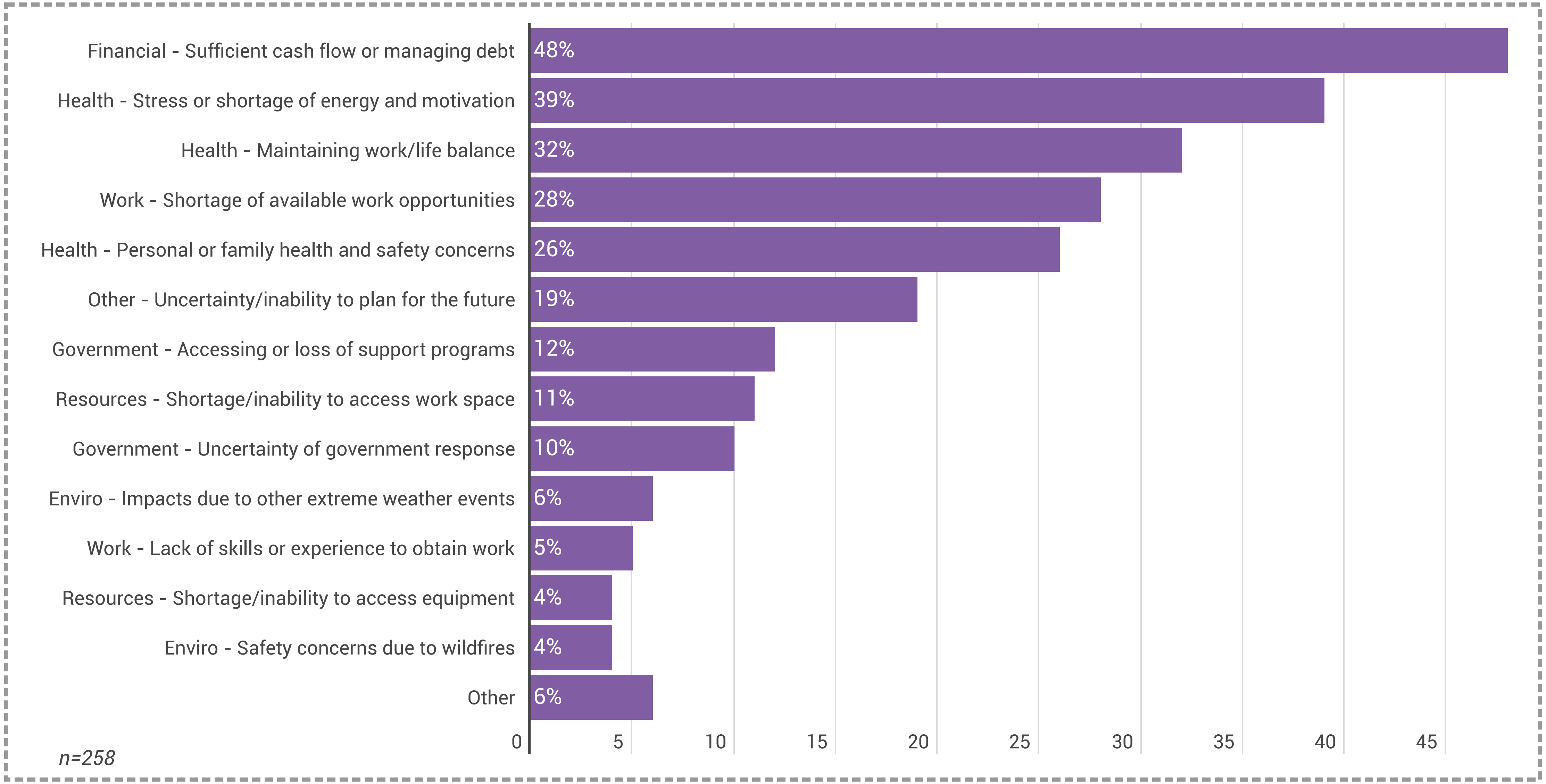
Cashflow and managing debt (**58%**) was the second most identified obstacle.

Other frequent obstacles included uncertainty to plan for the future (**44%**) and shortage of available work (**40%**).

Individuals

Anticipated Obstacles

Over the NEXT SIX MONTHS, what are your (up to) TOP THREE obstacles you anticipate facing?



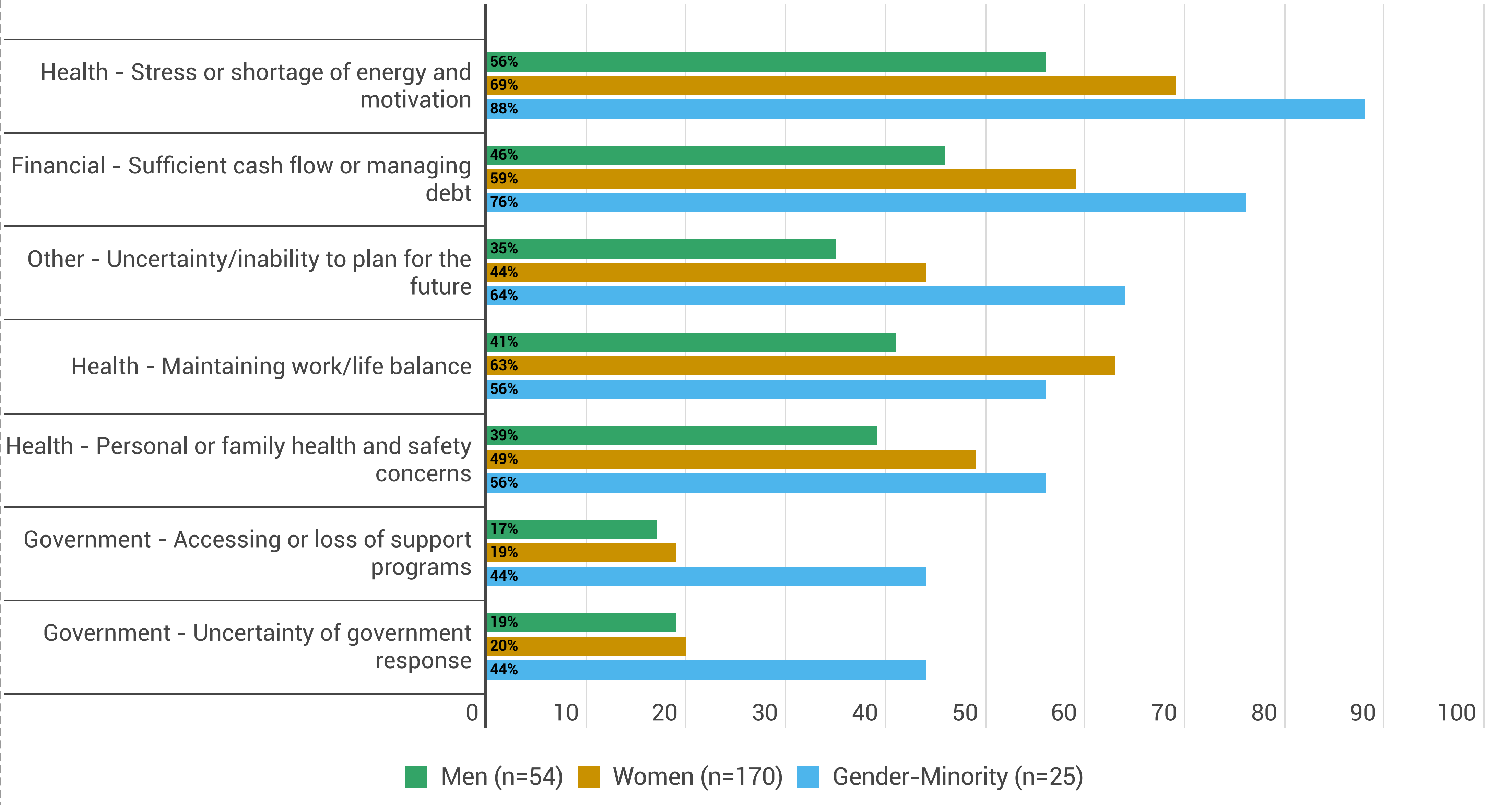
What we see

When thinking about anticipated obstacles over the coming months, the most common included: cashflow and managing debt (**48%**), stress (**39%**), and work/life balance (**32%**).

Individuals

Recent Obstacles: Men / Women / Gender-Minority

Over the last SIX MONTHS, which of the following are obstacles you have faced?



What we see

When comparing obstacles experienced in the last six months based on gender identity, these seven obstacles had a higher variation between the groups.

The most frequently identified obstacles for **gender minority** respondents were stress (**88%**), cash flow (**76%**), and inability to plan for the future (**64%**). **Women** identified stress (**69%**), work/life balance (**63%**), and cash flow (**59%**). **Men** identified stress (**56%**), cash flow (**46%**), and work/life balance (**41%**).

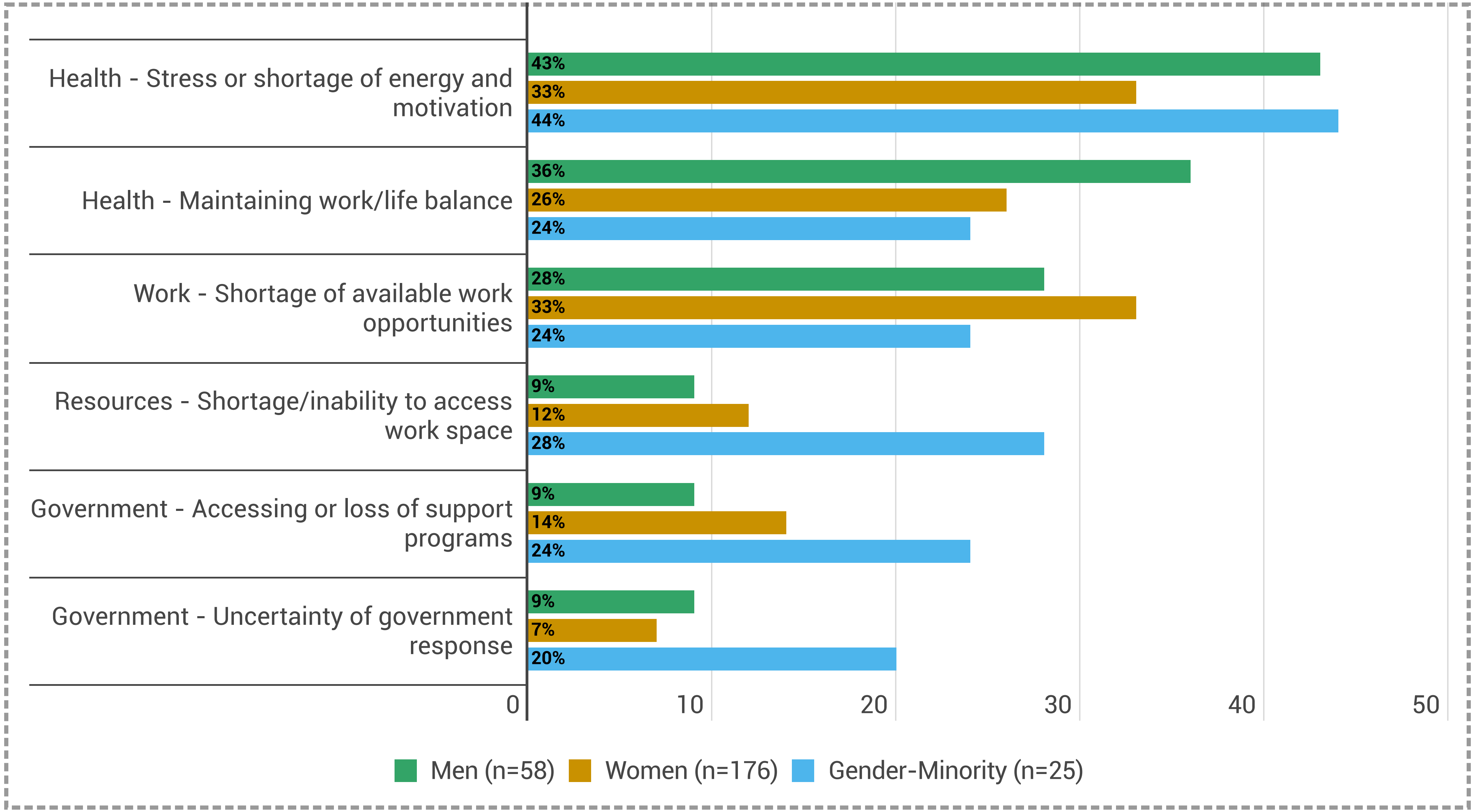
A higher percentage of **gender minority** respondents reported facing obstacles in six of these seven categories, compared to **men** and **women**.

**"Gender Minority" includes individuals who selected an option other than exclusively "Man" or "Woman", including but not limited to non-binary, transgender, and two-spirit.*

Individuals

Anticipated Obstacles: Men / Women / Gender Minority

Over the NEXT SIX MONTHS, what are your (up to) TOP THREE obstacles you anticipate facing?



What we see

When comparing anticipated obstacles over the six months based on gender identity, these six obstacles had a higher variation between the groups.

The obstacles identified by one-third or more of each grouping of respondents included: stress (**44% gender minority**; **43% men**; **33% women**), work/life balance (**36% men**), and shortage of work opportunities (**33% women**).

A higher percentage of **men** identified work/life balance (**⬆10pt**) compared to others.

A higher percentage of **women** identified shortage of work opportunities (**⬆5pt**) compared to others.

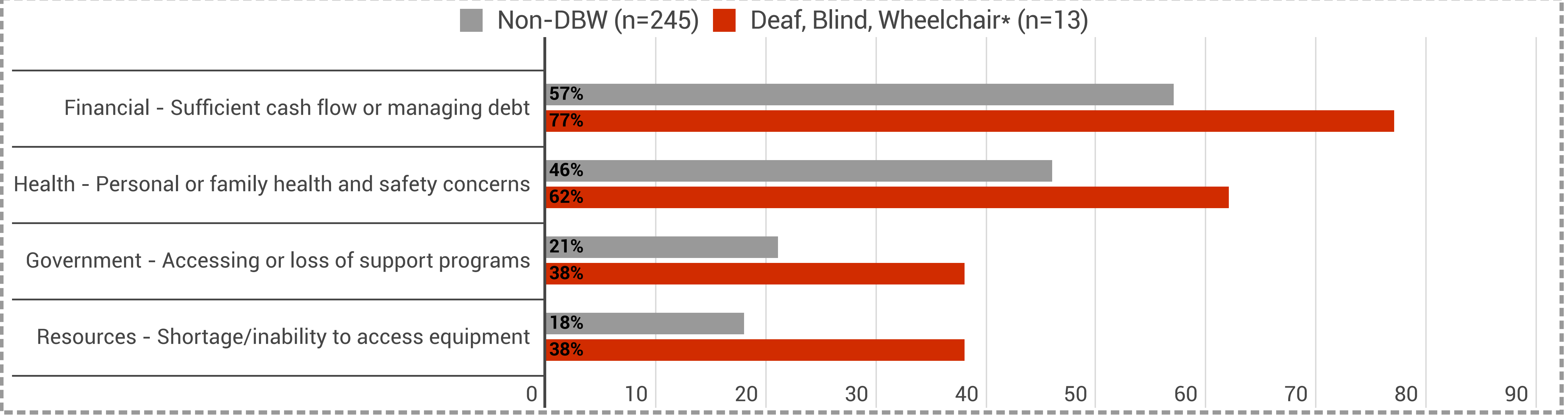
A higher percentage of **gender minority** respondents identified inability to access work space (**⬆16pt**), loss of government support programs (**⬆10pt**), and uncertainty of government responses (**⬆11pt**), compared to others.

**"Gender Minority" includes individuals who selected an option other than exclusively "Man" or "Woman".*

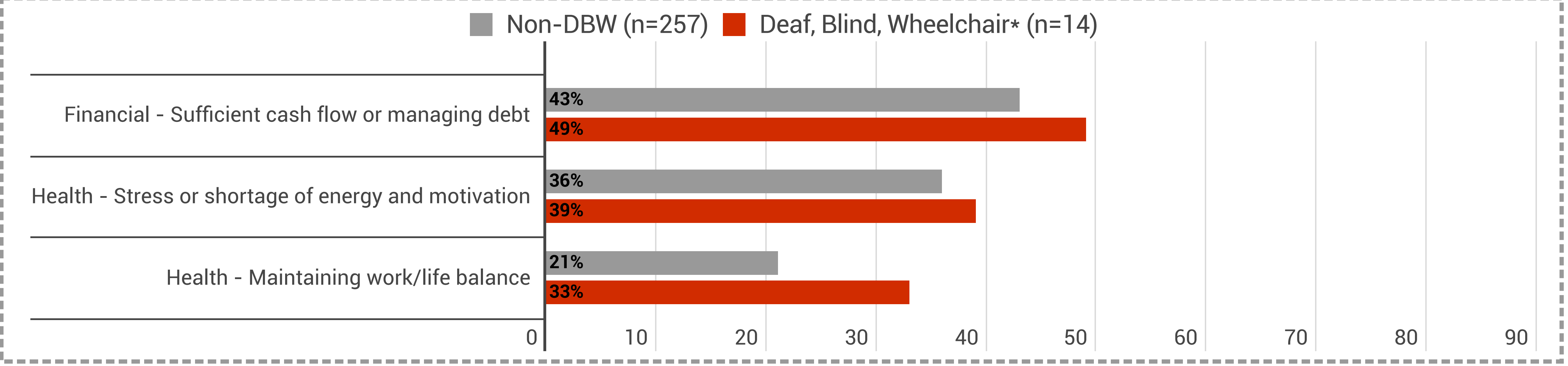
Individuals

Obstacles: Deaf, hard of hearing, blind, low vision, wheelchair or mobility aid users

Over the last SIX MONTHS, which of the following are obstacles you have faced?



Over the NEXT SIX MONTHS, what are your (up to) TOP THREE obstacles you anticipate facing?



What we see

On this page, we've segmented the responses from **Deaf, hard of hearing, blind, low vision, wheelchair or mobility aid users**.

We've highlighted obstacles experienced or anticipated by at least **one-third** of the respondent group.

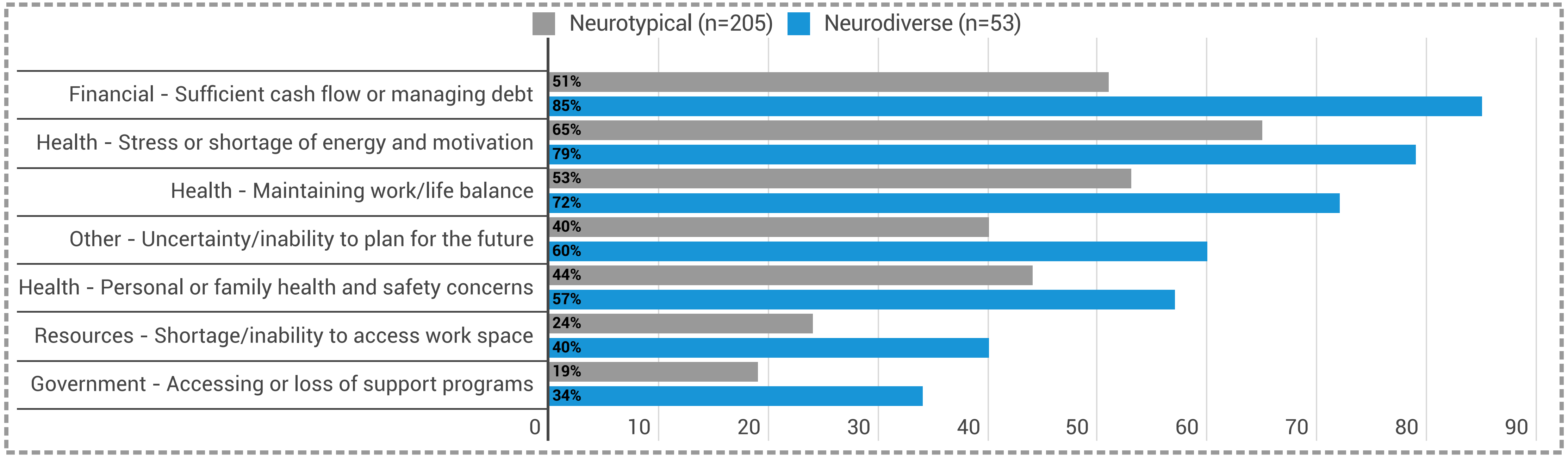
Cash flow challenges were recently experienced by **77%** of respondents and it continues to be an anticipated concern for the months ahead for nearly half (**49%**).

When compared to other respondents, a higher percentage of this grouping experienced challenges related to cash flow, accessing government programs, and accessing equipment.

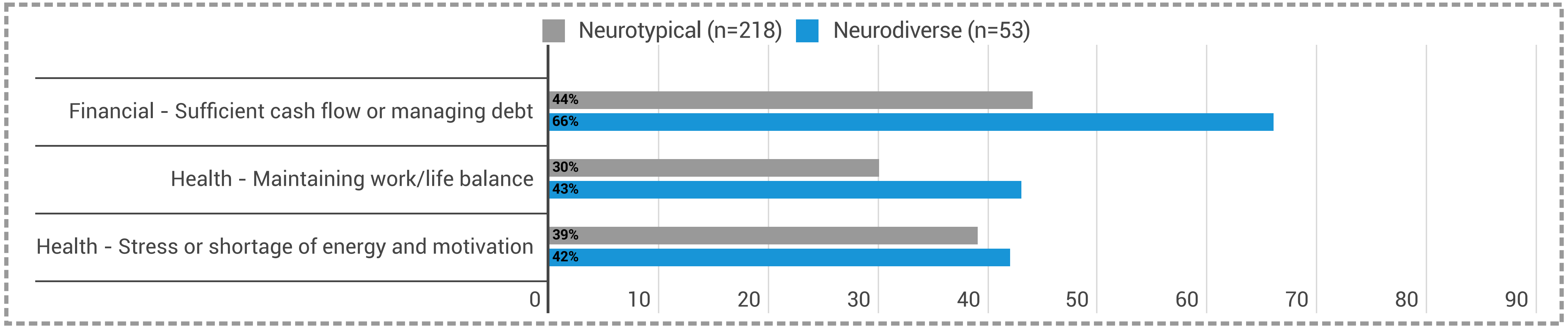
Individuals

Obstacles: Neurodiverse

Over the last SIX MONTHS, which of the following are obstacles you have faced?



Over the NEXT SIX MONTHS, what are your (up to) TOP THREE obstacles you anticipate facing?



What we see

On this page, we've segmented the responses from respondents who identified as **neurodiverse**.

We've highlighted obstacles experienced or anticipated by at least **one-third** of the respondent group.

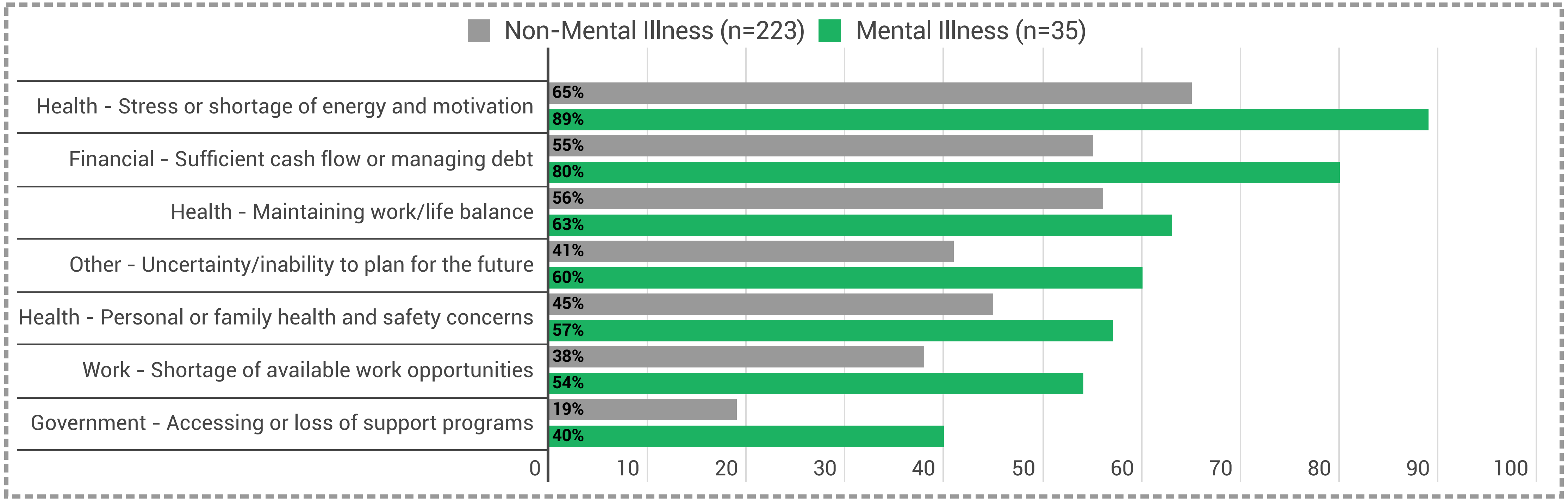
A higher percentage of neurodiverse respondents, compared to others, identified seven obstacles experienced in the last six months, from cash flow (⬆**34 ppts**) to health and safety concerns (⬆**13 ppts**).

Cash flow over the coming months continues to be a significant concern for this respondent group (**66%**), especially in comparison to other respondents (**44%**).

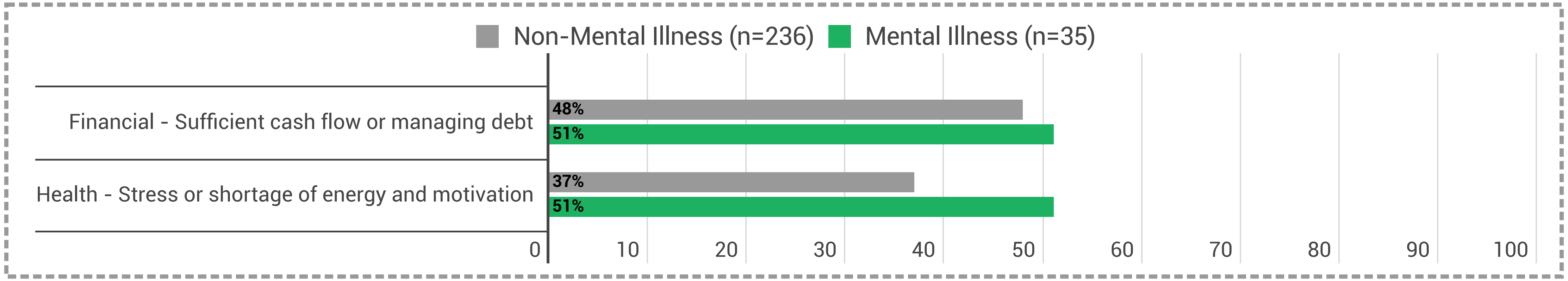
Individuals

Obstacles: Living with a mental illness

Over the last SIX MONTHS, which of the following are obstacles you have faced?



Over the NEXT SIX MONTHS, what are your (up to) TOP THREE obstacles you anticipate facing?



What we see

On this page, we've segmented the responses from respondents who identified themselves as a **person living with a mental illness.**

We've highlighted obstacles experienced or anticipated by at least **one-third** of the respondent group.

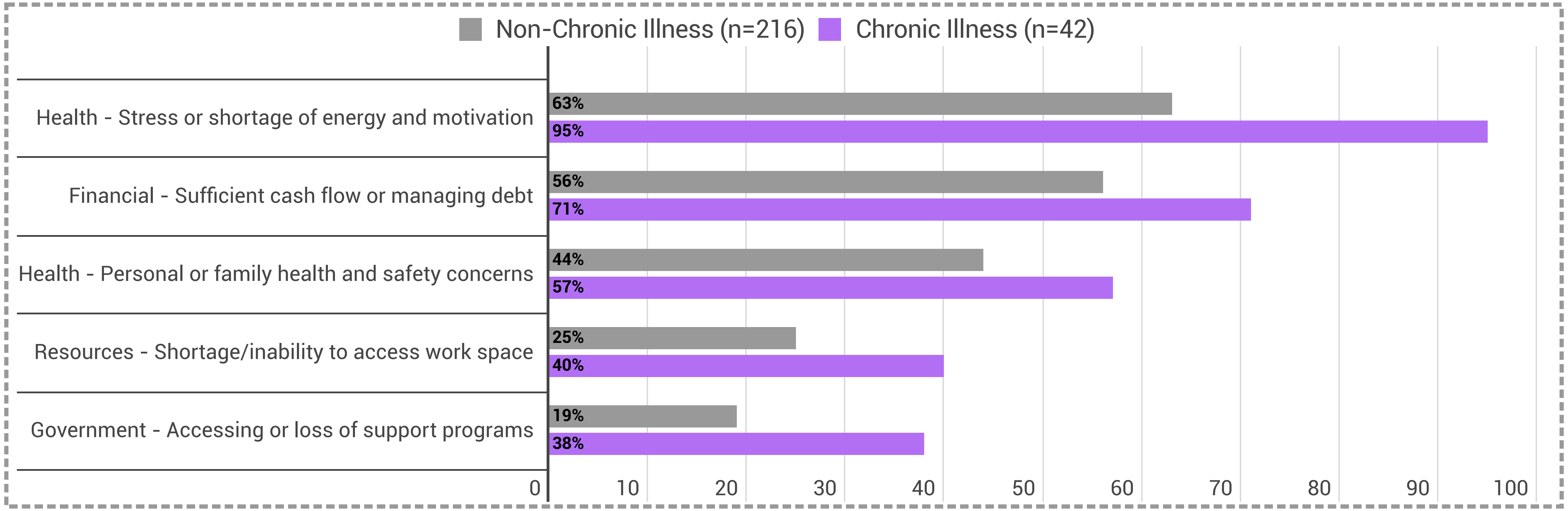
A higher percentage of this group of respondents, compared to others, identified seven obstacles experienced in the last six months, from cash flow (**⬆25ppts**) to work/life balance (**⬆7ppts**).

Half (**51%**) of this group expect cash flow and stress to be an obstacle over the coming months, whereas stress was **14 points higher** than other respondents.

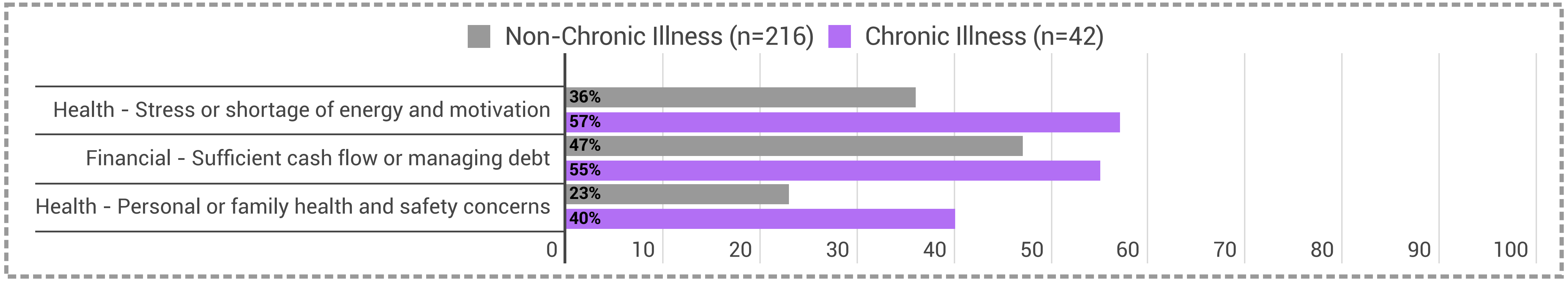
Individuals

Obstacles: Living with a chronic illness

Over the <u>last SIX MONTHS</u>, which of the following are obstacles you have faced?



Over the NEXT SIX MONTHS, what are your (up to) TOP THREE obstacles you anticipate facing?



What we see

On this page, we've segmented the responses from respondents who identified themselves as a **person living with a chronic illness**.

We've highlighted obstacles experienced or anticipated by at least **one-third** of the respondent group.

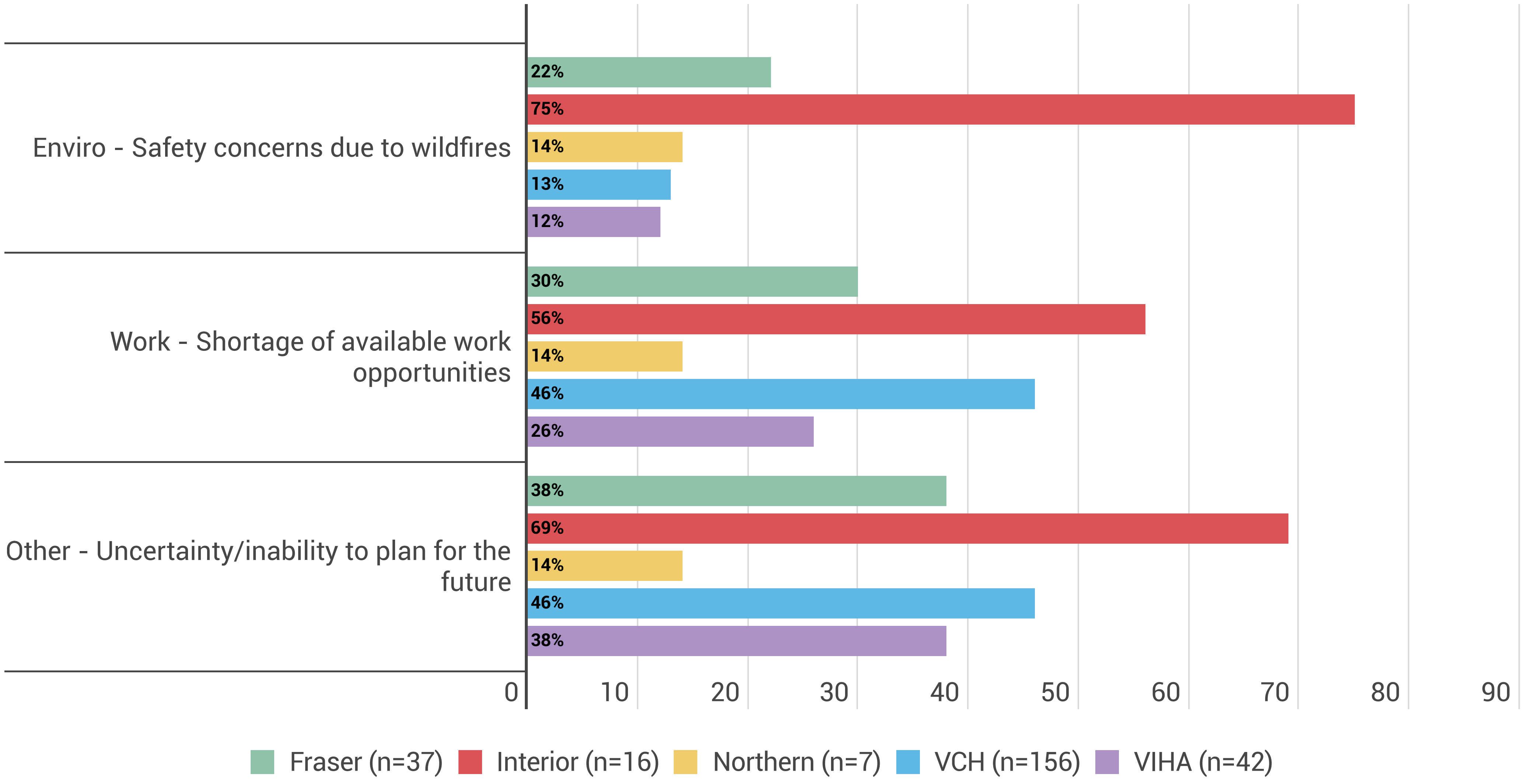
A higher percentage of this group of respondents, compared to others, identified five obstacles experienced in the last six months, from <u>stress and shortage of energy</u> (**⬆32ppts**) to <u>work/life balance</u> (**⬆6 ppts**).

More than half of this group expect <u>stress and shortage of energy</u> (**57%**) and <u>cash flow</u> (**55%**) to be an obstacle over the coming months. <u>Stress</u> (**⬆21 ppts**) and <u>health and safety concerns</u> (**⬆17 ppts**) are higher than other respondents.

Individuals

Recent Obstacles: By Region (Health Authority)

Over the last SIX MONTHS, which of the following are obstacles you have faced?



What we see

The 258 responses to this question were segmented based on Health Authority region while highlighting responses that had a significant variation between regions.

Most (**75%**) individuals in the **Interior** region identified safety concerns due to wildfires.

Interior region respondents also had a higher percentage identify concerns about the inability to plan for the future (**69%**) and shortage of available work opportunities (**56%**).

Nearly half (**46%**) of the respondents from the **Vancouver Coastal Health** region also identified shortage of available work opportunities and inability to plan for the future.

Individuals

External Factors

When thinking specifically about external factors that may directly impact your work, arts practice, or well-being, what are one or two factors you are particularly concerned or thinking about as we move into 2024?

What we heard

Of the 178 Individuals who responded to this question, concerns for 2024 include:

Financial - Inflation. High cost of living, including housing and general expenses. No significant increase to wages. Insufficient government funding to support the sector.

Environmental - Insufficient resources invested to prepare for or respond to extreme weather events (eg. floods, wildfires, heat domes).

Political and Government - Uncertainty moving into an election year and potential changes in priority affecting arts funding. Arts sector not seen as a priority at all levels of government.

Health and Wellbeing - Community members' health has direct and indirect impact on others.

Professional Stability - With organizations also struggling there are fewer opportunities to maintain work or practice. Need support at different stages of career development.

Societal Challenges - Ageism, racism, ableism, and other "isms" affecting access to participation, supports, services, and opportunities.

Global Events - Wars, economic downturns, politics in other countries and regions affect individuals locally, and impact government response and priorities here.

Technology - The impact of new tech and AI on jobs, artistic practice, and legal protections related to copyright.

> **Availability and affordability of suitable arts spaces.**

> **Extreme competition of project grants.**

> **Desperate to sell seats, thus programming or creating "safe" art.**

> **Global situation and climate crisis are of grave concern.**

> **Rental market is insane.**

> **I'm aging out, but my field exhibits declining opportunities for younger participants.**

Organizations

Organizations

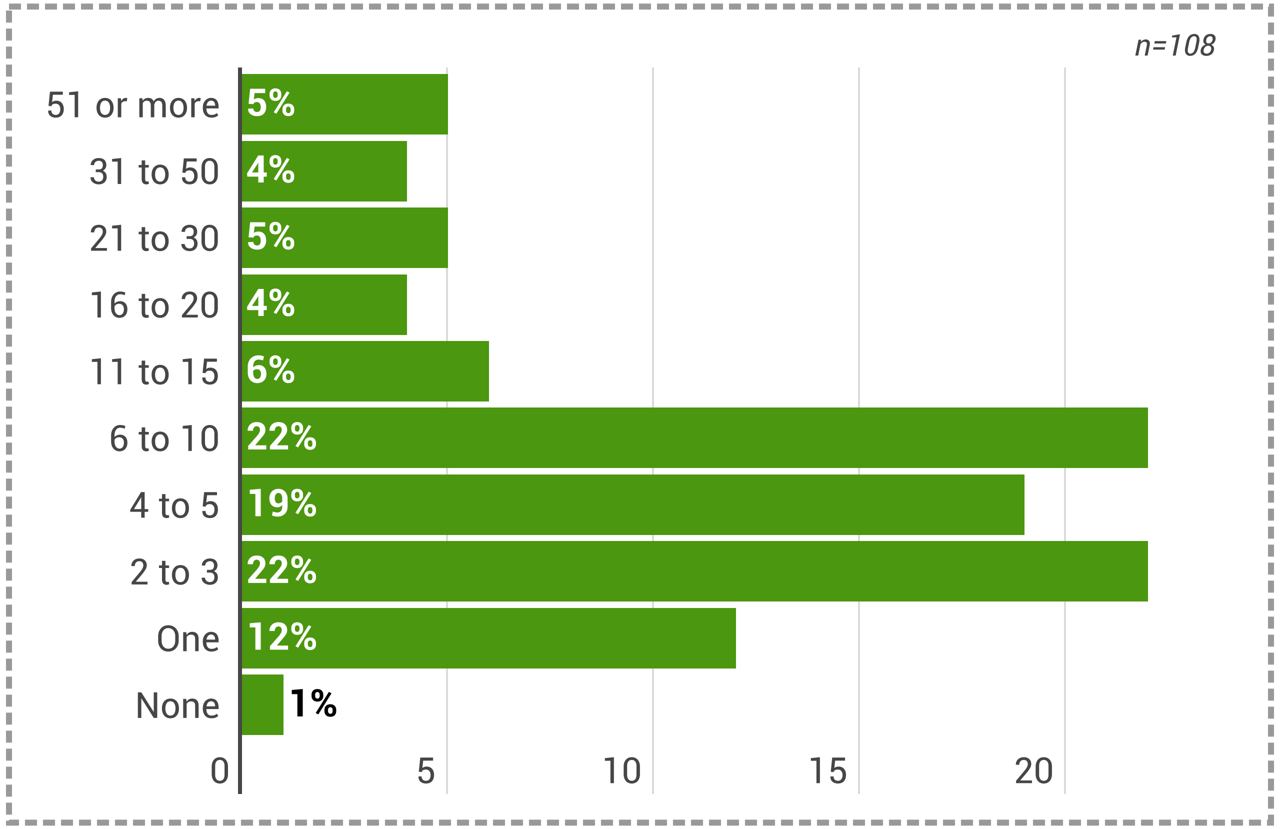
Staff and Board

What we see

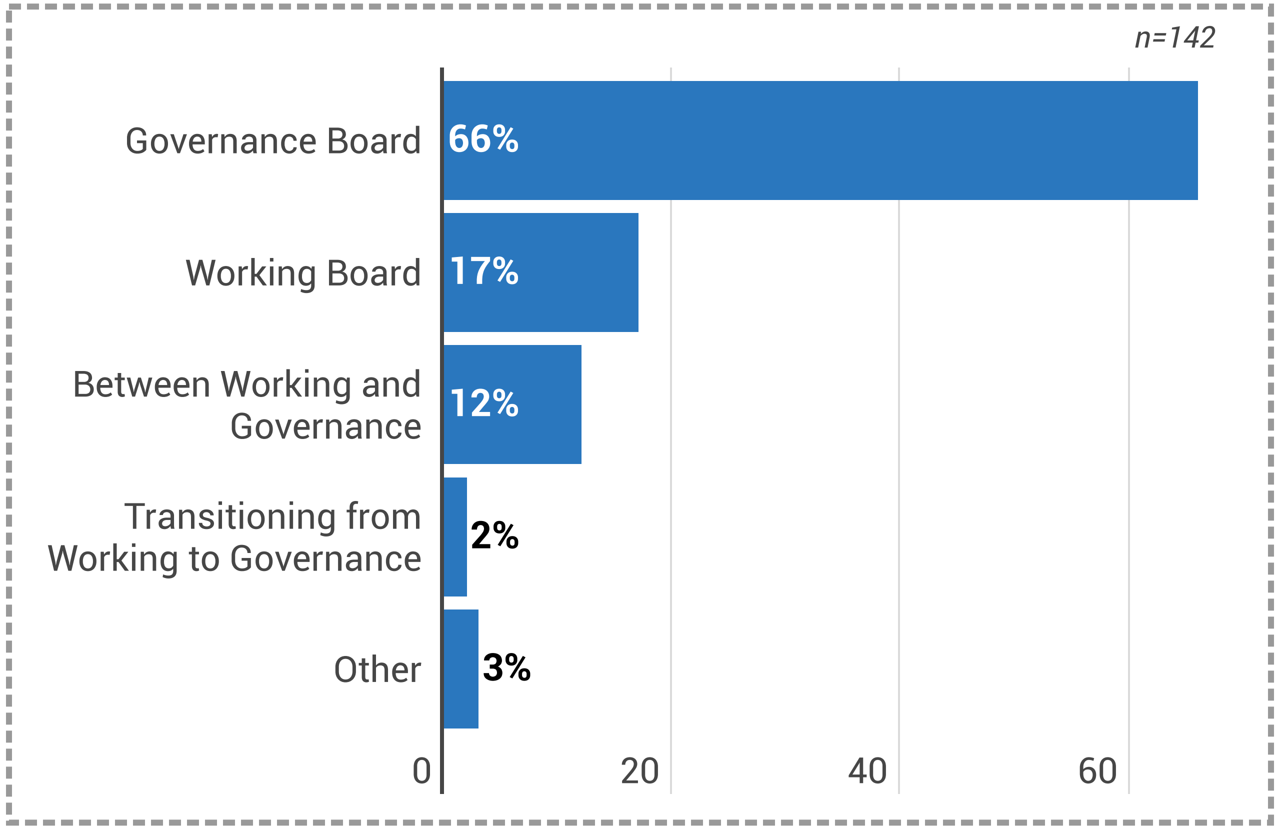
One-third (**34%**) of responding organizations have one to three **year-round staff and contractors**, **41%** have four to ten staff, and one-quarter (**24%**) have more than ten year-round staff members.

Of the non-profit and charitable organizations that responded about the **type of board** they have, **65%** indicated a governance board, **17%** a working board, and **12%** operating somewhere in between working and governance,

How many year-round (or nearly year-round) staff and contractors does your organization have?



How would you best describe the type of Board of Directors your organization currently has?



Organizations

Decision-Making Structure

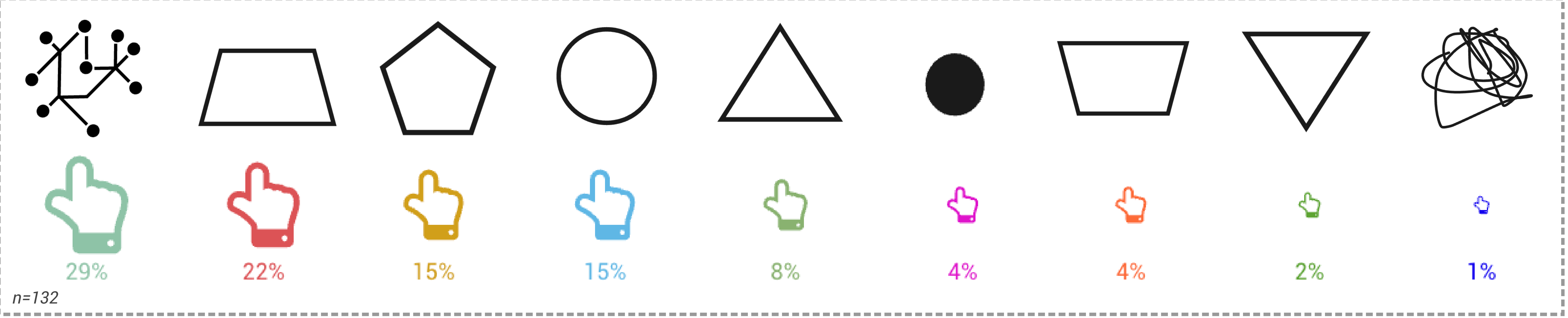
What we see

Of the non-profit or charitable status organizations, more than a quarter (**29%**) chose the interconnected dots image to represent their decision-making structure. When asked to describe why they chose a particular shape or image, the themes of collaboration and sharing leadership was communicated across most of the image options.

Imagine your organization's decision-making structure as a shape or image. Which of the following images is the closest representation of how it operates?

“Shared leadership, decision-making, and accountability. Decisions are based on consensus. *(circle)*

“All levels of the organization are part of the decision making process but in some cases it may fall to one person. *(pentagon)*



“I tried to choose the most collaborative model from what I could interpret. *(interconnected dots)*

“We engage in collaborative decision making but lines of accountability remain hierarchical. *(trapezoid, narrow top)*

“Board is heavily involved in decision making and is supported, to some extent, by other volunteers. *(triangle, wide top)*

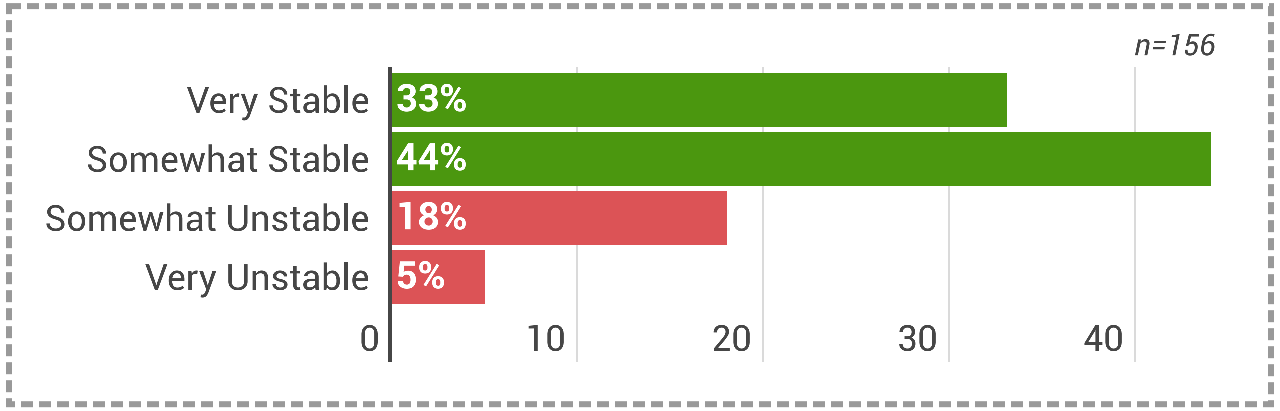
“I basically run the whole organization by myself. *(dot)*

“We don't have the luxury of an organized decision making process because we don't have enough staff to run things in a more traditional way. *(scribble)*

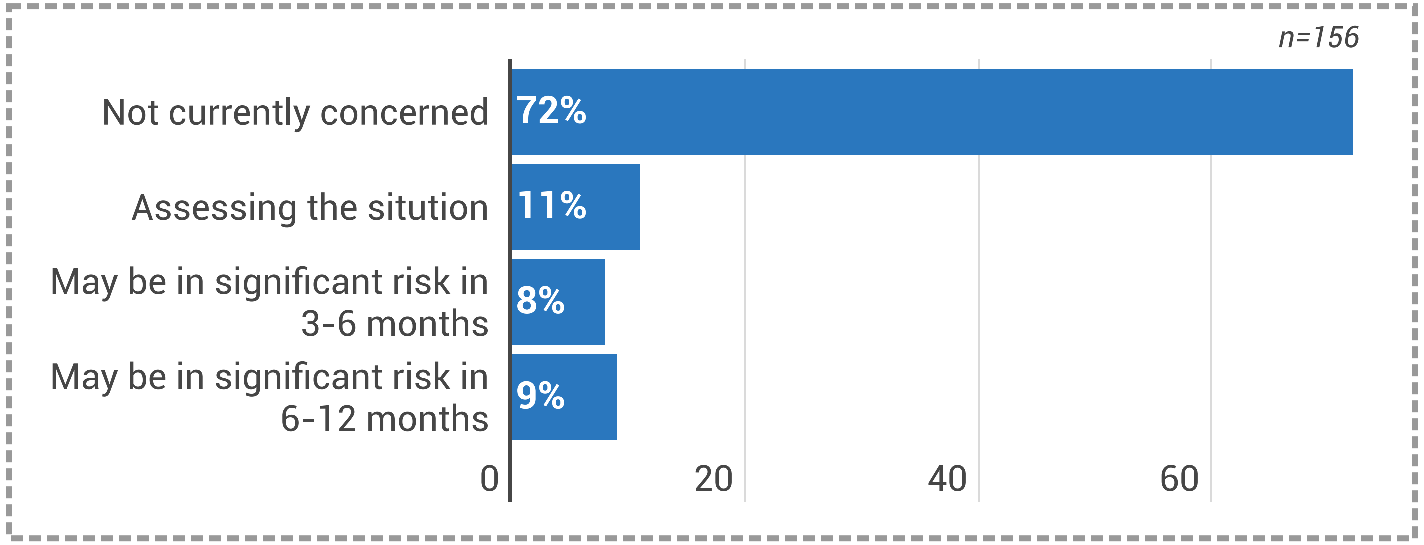
Organizations

Financial Stability

How stable is your organization's cash flow?



Is your organization at risk of insolvency, bankruptcy, or ceasing operations?



What we see / heard

77% of respondents shared that they're organization's cash flow is somewhat or very stable. Nearly a quarter (23%) are in a somewhat or very unstable cash flow situation.

Common reasons for the instability included: **Increased expenses** for programs, activities, rent, and general expenses; **Limited and loss of funding** and fund development options; **Reduced earned and contributed revenue** from number of patrons and ticket sales to sponsorships and donations.

What we see / heard

While **11%** of respondents are assessing the situation, **17%** are concerned their organization is at significant risk of insolvency, bankruptcy, or ceasing operations within the next 12 months.

The most common reason cited for the risk was related to the **inability to raise or secure additional funds** to support the organization while also producing programs and activities with increased costs.

Organizations

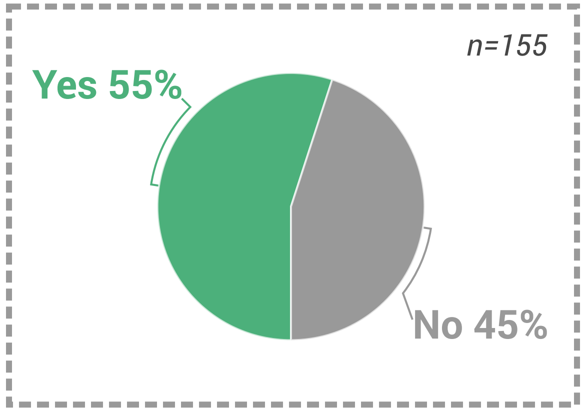
Venue and Office Space Stability

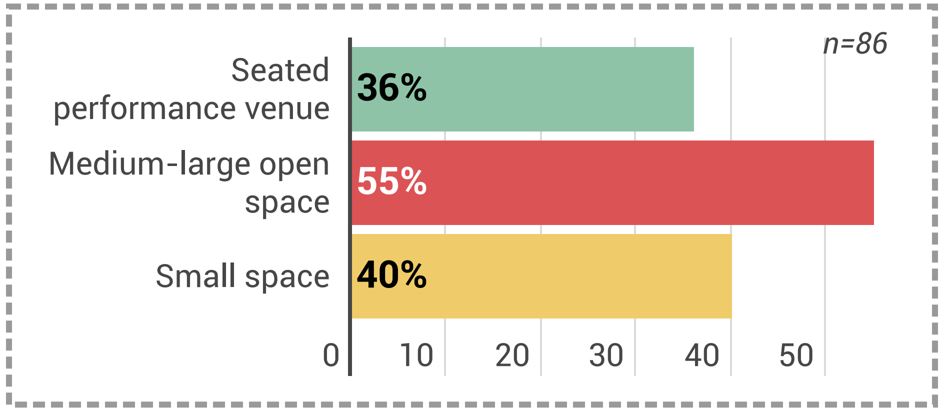
What we see / heard

Of the 86 organizations that operate a venue or facility used for programming and activities, **36%** are **a little** or **somewhat concerned** about an unplanned loss of one or more of their spaces within the next year. **14%** are **very concerned**.

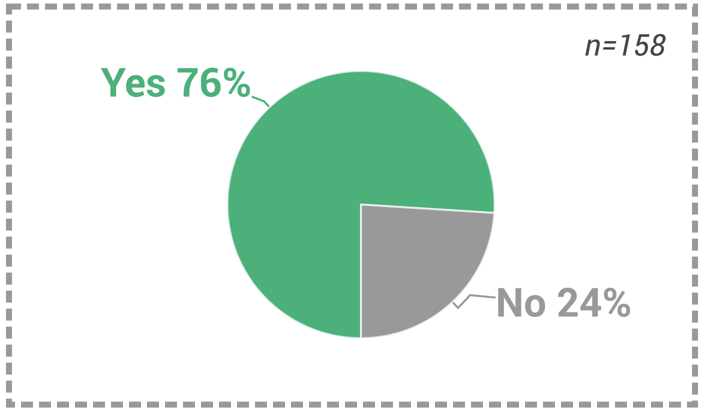
Of the 117 organizations with a dedicated office space, more than a quarter (**27%**) have **some concern** about an unplanned loss of that space within the next year.

Does your organization currently operate a venue or facility which is used for programming or non-administrative activities?

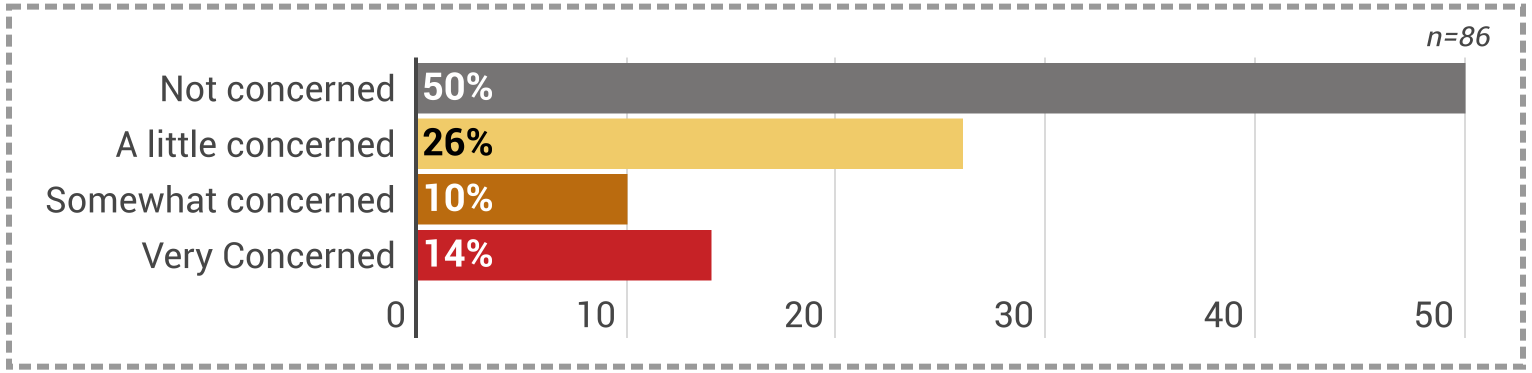




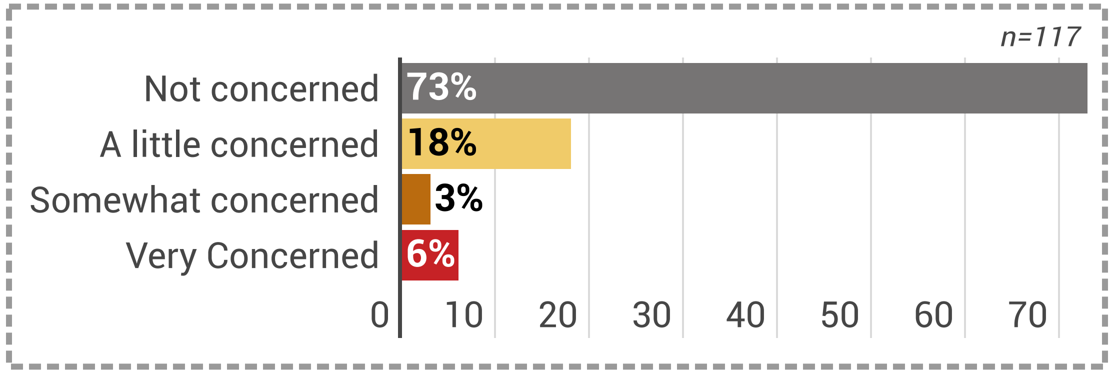
Does your organization currently have a dedicated office space used for administration? (not including a home office)



How concerned are you about an unplanned loss of one or more of your venues or facilities within the next year?



How concerned are you about an unplanned loss of your office space within the next year?



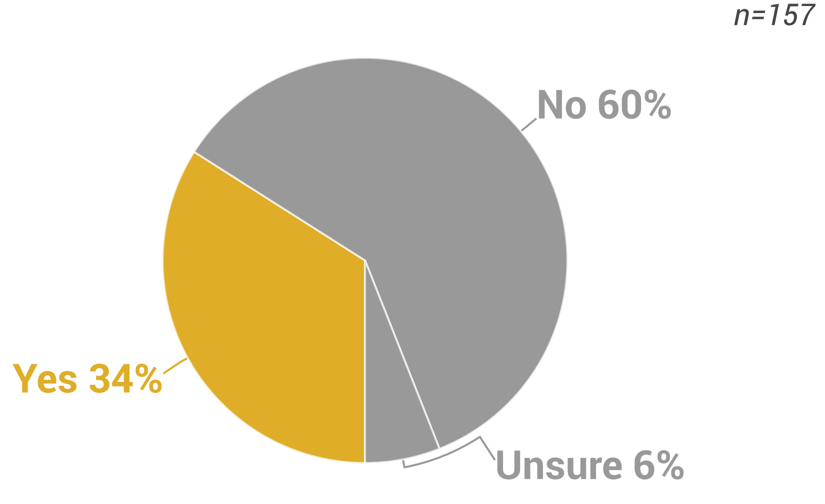
Organizations

Previous Recovery Funding

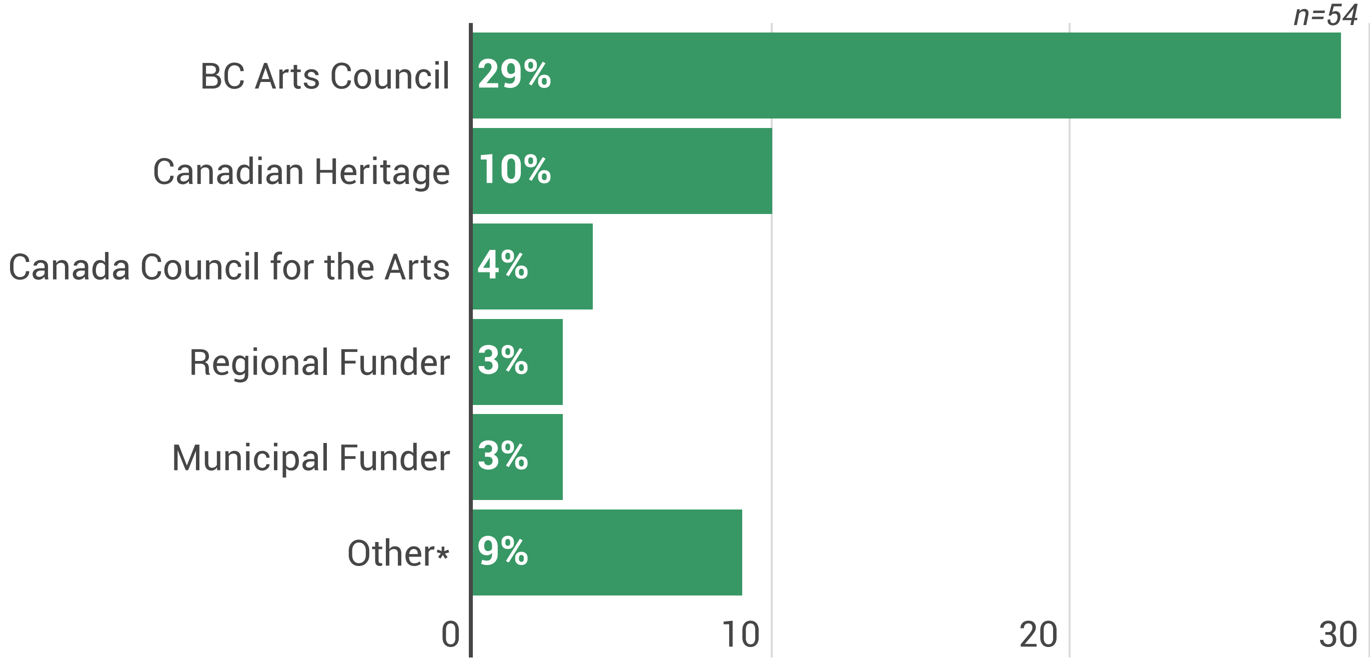
What we see

More than one-third (**34%**) of organizations that responded reported **relying on one-time recovery funding** received this year from a public agency to keep them operating. More of those organizations accessed recovery supports from BC Arts Council (**29%**) than from any other agency.

Within the current year (2023), have you relied on one-time recovery funding from public sector agencies to help reduce the risk of insolvency, bankruptcy, ceasing operations, or loss of space, or stabilize cash flow?



Which public sector agencies did you receive one-time recovery funding from this year (2023)?



Other* Other funders identified included Ministry of Tourism, Arts, Culture, and Sport; Creative BC; United Way; Vancouver Foundation; Pacific Economic Development Canada.

Organizations

Trends: Programs and Activities

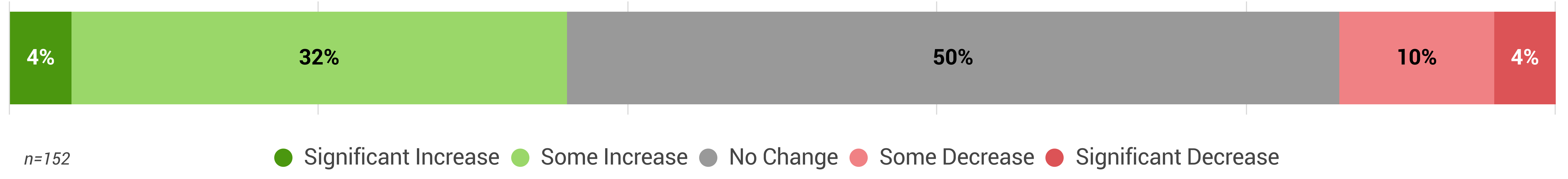
What we see / heard

The vast majority of respondents (**88%**) reported that their programs and activities have stayed the same (**40%**) or increased (**48%**) **compared to 2022**.

While looking toward **programs and activities in 2024**, half of respondents (**50%**) expect it to remain the same, while **36%** anticipate an increase in the number or scale.

How much has the number or scale of your organization's programs and activities increased or decreased this year (2023) compared to last year (2022)?

Based on what you know now, how much do you expect the number or scale of your organization's programs and activities to increase or decrease next year (2024), compared to this year (2023)?



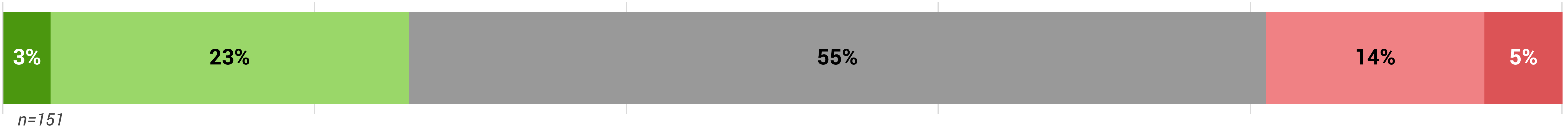
Organizations

Trends: Human Resource Capacity

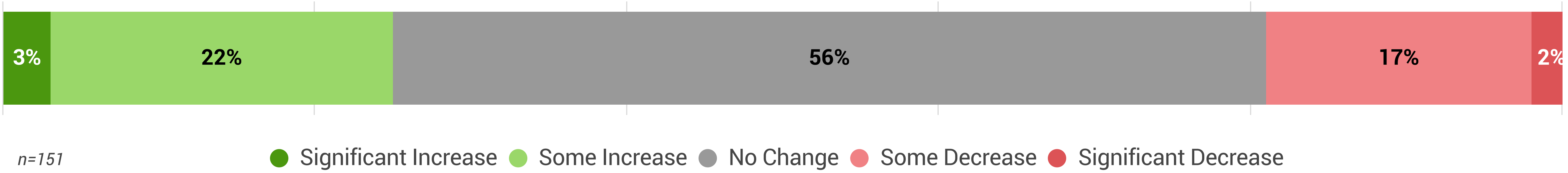
What we see / heard

While reflecting on changes in their human resource capacity, one-quarter (**26%**) of respondents had **some** or **significant increase** this year, compared to last year (2022), while one in five (**19%**) experienced a **decrease**. Expectations moving into 2024 are similar.

How much has your organization's human resource capacity increased or decreased this year (2023) compared to last year (2022)?



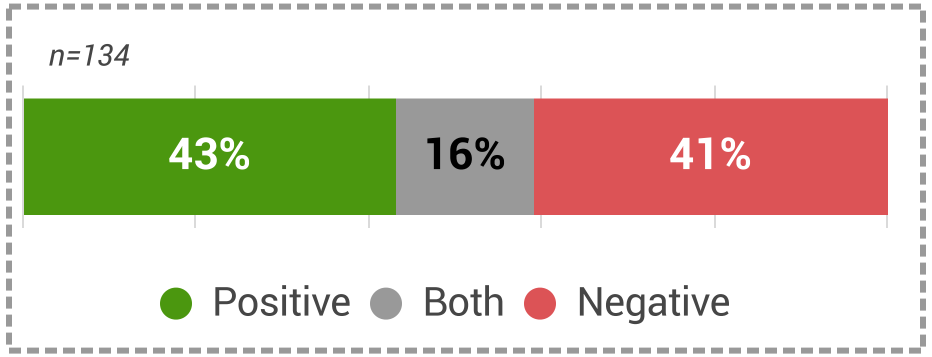
Based on what you know now, how much do you expect your organization's human resource capacity to increase or decrease next year (2024), compared to this year (2023)?



Organizations

Trends: Ticket Sales and Attendance

If you produced public-facing events or activities in the last 6 months, did you experience any positive or negative trends when it comes ticket sales or attendance?



What we see

An almost equal number of respondents said they experienced **positive** (**43%**) or **negative** trends (**41%**) with their ticket sales or attendance. **16%** said they experienced **both** positive and negative.

Positive Trends

Type of positive trends

Positive trends for some organizations included:

- Return to pre-pandemic attendance levels;
- New audiences (eg. culturally diverse, wider range of age) engaged with programming and activities;
- Increased demand for kids and youth educational programs (eg. day camps, field trips);
- Patrons purchasing tickets earlier than previous years

Factors that contributed to the positive trends

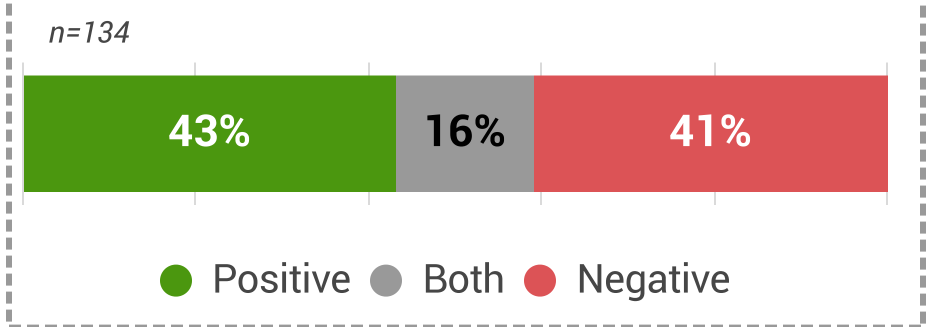
Some factors that contributed to the positive trends included:

- Thematic programming (eg. lighter, happier content; content tailored to target communities);
- Strong partnerships and collaborations with other arts and community organizations;
- Localized marketing and community engagement strategies;
- Activities outdoor and using spaces that are not typical for the organization;
- Shifting from online to in-person;
- More time has passed from the height of the pandemic;
- Financial accessibility (eg. free and flexible pricing options);
- Social behaviour - Patrons creating new routines and general public sentiment of attending events is improving.

Organizations

Trends: Ticket Sales and Attendance

If you produced public-facing events or activities in the last 6 months, did you experience any positive or negative trends when it comes ticket sales or attendance?



What we see

An almost equal number of respondents said they experienced **positive** (**43%**) or **negative** trends (**41%**) with their ticket sales or attendance. **16%** said they experienced **both** positive and negative.

Negative Trends

Type of negative trends

Negative trends included:

- Slow recovery of attendance levels;
- More patron hesitancy for indoor activities compared to outdoor;
- Increase in the number of "no-shows" for purchased tickets;
- "Riskier" or unknown programming was harder to sell;
- Cancelled events and activities due to low ticket sales, or illness within staff, cast, or crew;
- More patrons choosing the cheapest tickets.

Factors that contributed to the negative trends

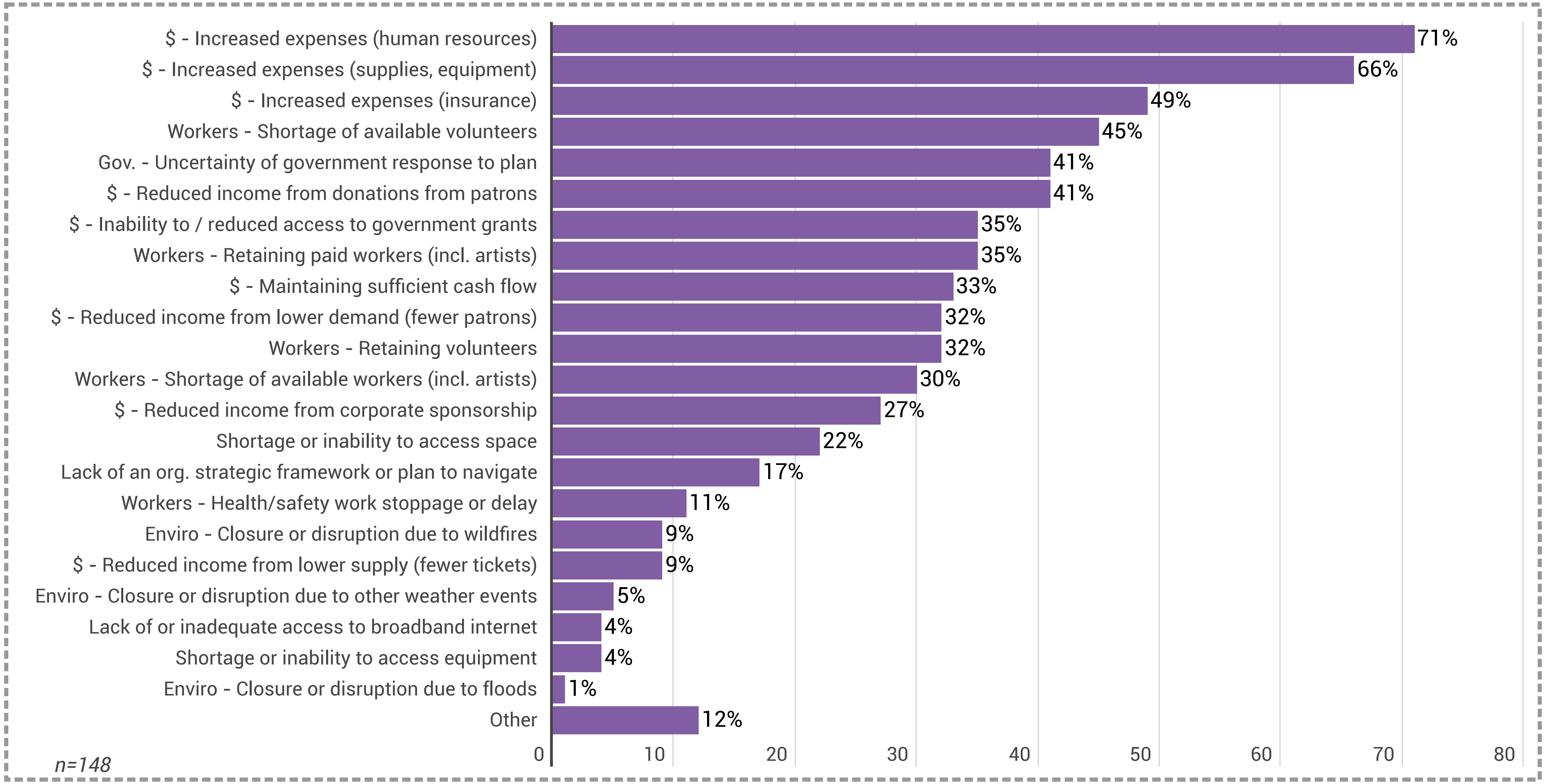
Some factors that contributed to the negative trends included:

- Increased inflation resulted in less funds for patrons to purchase tickets or register;
- Decreased programming and activities due to budget cuts, reducing visibility and consistency with patrons;
- Increased feeling of competition with other events and activities, with patrons' limited funds;
- Environmental (eg. wildfires) and geopolitical events impacted finances, personal energy, and mental health;
- Declining neighbourhood safety around event spaces;
- Lack of resources to expand or strengthen programs and activities;
- Difficulty reintroducing live events to some patrons who had been used to an abundance of online programming.

Organizations

Recent Obstacles

Over the LAST SIX MONTHS, which of the following are obstacles your organization has faced?



What we see

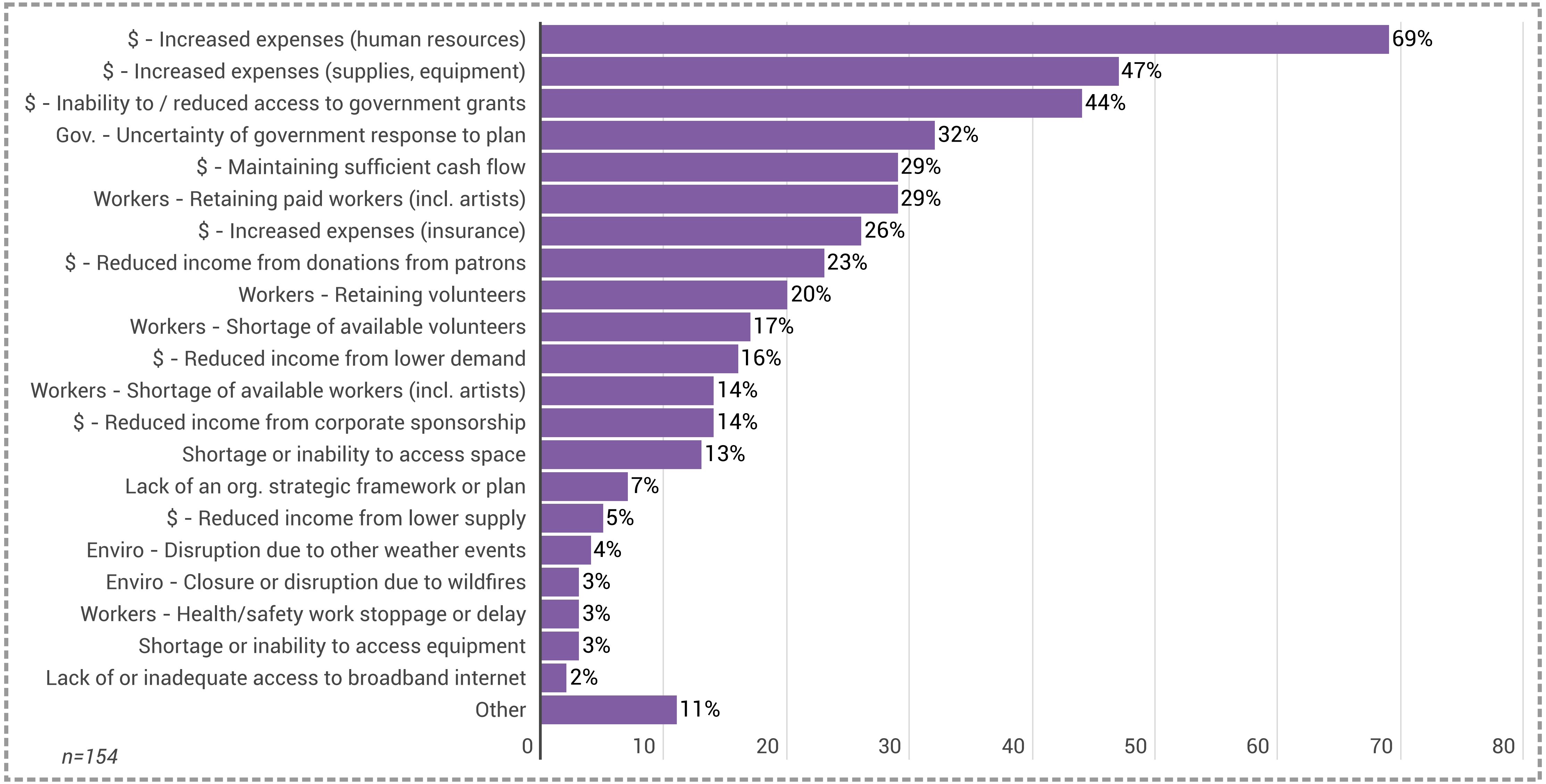
When reflecting on **obstacles they faced over the past six months**, the three most frequently identified were related to **increased expenses**, including human resources (**71%**), supplies and equipment (**66%**), and insurance (**49%**).

Some of the other obstacles outside of this list included: increased cost of rent or taxes for office, space, or rental venues; experience of burnout for staff and artists.

Organizations

Anticipated Obstacles

Over the NEXT SIX MONTHS, what are your (up to) TOP FIVE obstacles you anticipate facing?



What we see

When reflecting on obstacles organizations anticipate facing over the coming months, the three most frequently identified were related to finances, including increased expenses for human resources (**69%**) and supplies and equipment (**47%**), followed by the inability or reduced access to government grants (**44%**).

Some other obstacles outside of this list included: future increases to the cost of rent and taxes; and inability to plan for and navigate general uncertainty.

Organizations

External Factors

When thinking specifically about external factors that may directly impact your organization's well-being, what are one or two factors you are particularly concerned or thinking about as we move into 2024?

What we heard

Of the 115 Organization respondents for this question, concerns for 2024 include:

Financial - Economic downturn including inflation, rising costs, unstable funding to weather the challenges.

Health and Wellbeing - Long COVID, respiratory illness season, and other health-related impacts to staffing levels and potential cancelled shows/exhibits/activities.

Political and Government - Changes in political priorities at all levels of government, including the risk of funding cuts.

Environmental - Wildfires and other extreme weather events impacting community safety, operations, and tourism economy.

Social and Community - Intersection between financial instability, housing instability, unhoused population, and mental health services.

Loss of Space - Risk of losing venues and rental spaces if physical infrastructure is too expensive to maintain.

Global Events - Global events and geopolitical tensions and instability which also impact local artists, workers, residents and communities.

Workforce - Attracting, training, and retaining qualified staff and volunteers amidst financial challenges for organizations and workers.

> **We went from a pandemic directly into what feels like an economic crisis**

> **Funding does not keep up with living wage increases**

> **Lack of affordable housing pushes staff to another sector or live somewhere else**

> **Reduced disposable income to spend on the arts**

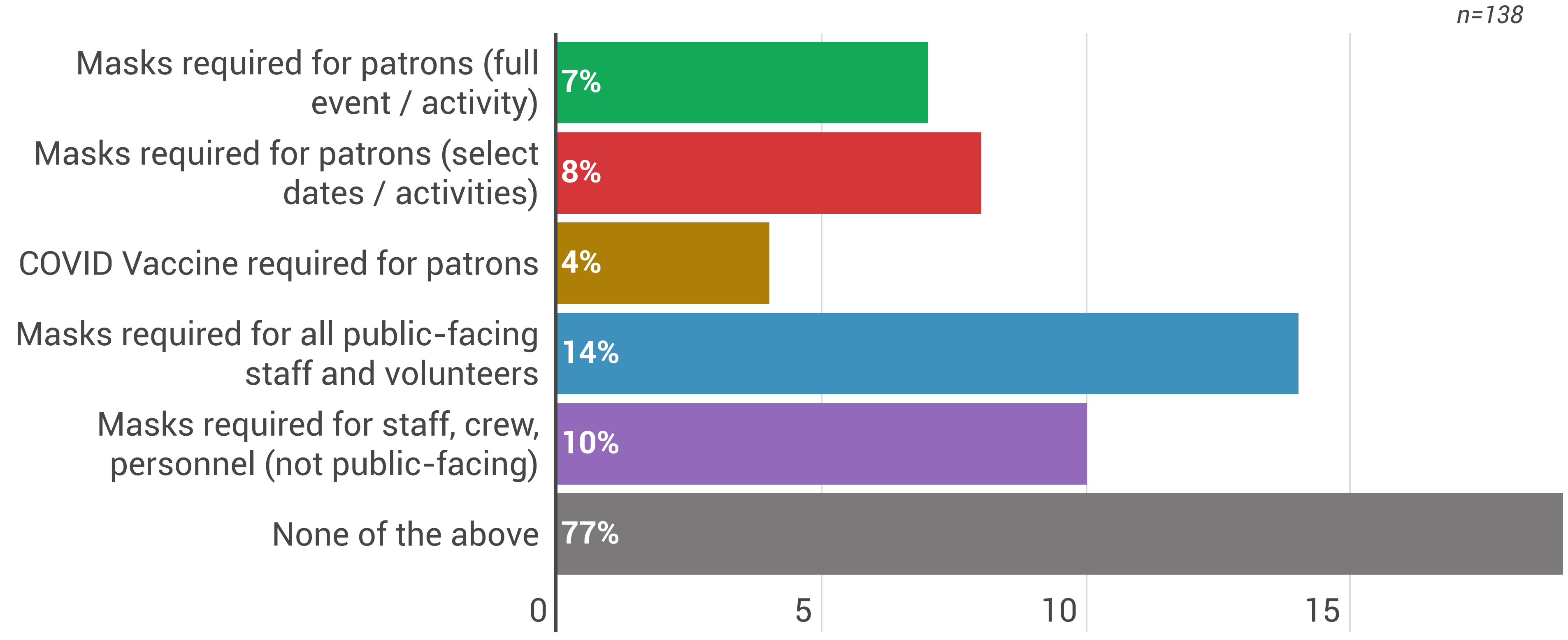
> **Income inequality and disability poverty**

> **We are losing our studio at the end of 2024**

Organizations

Health and Safety

As we move into the respiratory illness season, does your organization currently have, or expect to have, any of the following policies?



What we see

The majority of organizations (**77%**) indicated that they don't have or expect to have any specific health and safety policies such as masking or proof of COVID vaccination.

> **Masks required... we would like to require other measures but don't have the staff capacity to enforce this.**

> **We prioritize maintaining a robust health & safety plan as part of our work on equity and accessibility.**

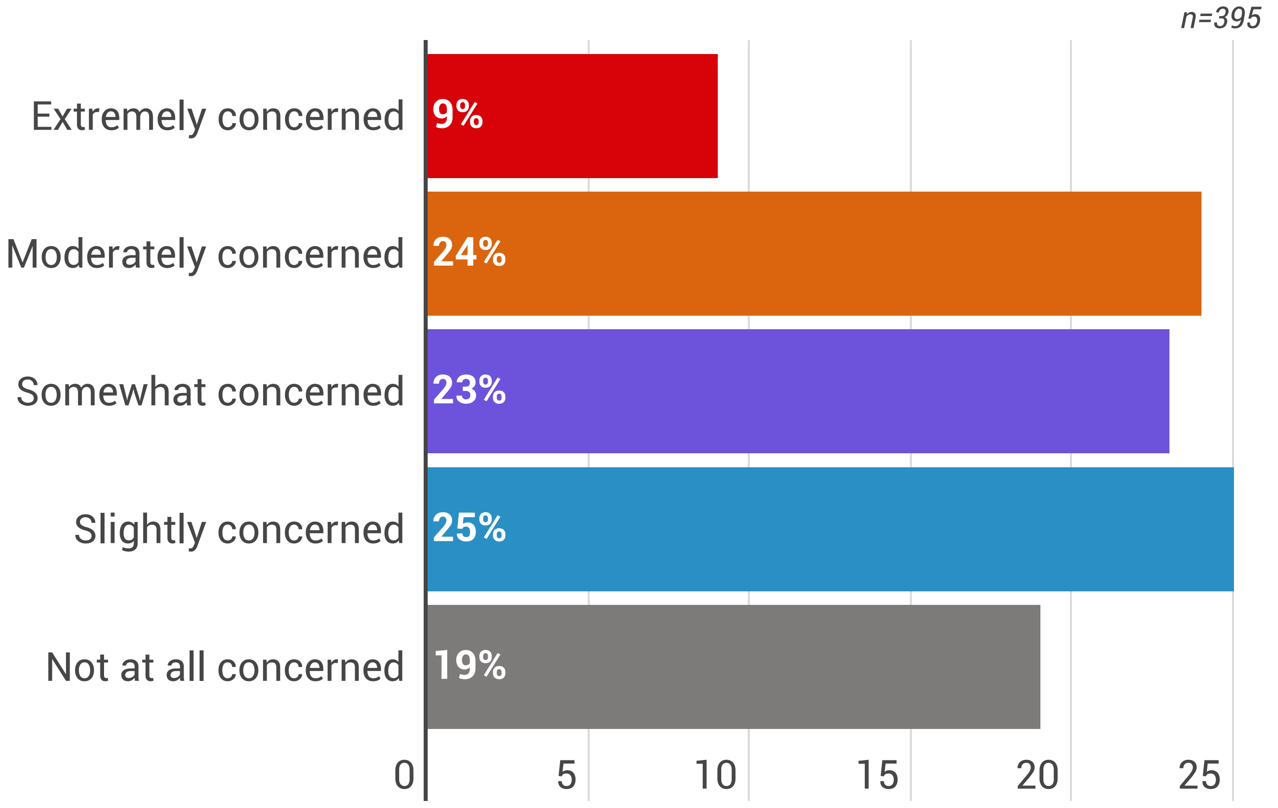
> **We are preparing for the worst but hoping for the best while remaining flexible.**

All Respondents

All Respondents

Health and Safety

As we move into the respiratory illness season, how concerned are you about your own personal health and wellness?



What we see

One-third (**33%**) of respondents expressed **moderate** or **extreme concern** for their own health and wellness as we move into respiratory illness season. Almost half (**48%**) of respondents are **slightly** or **somewhat concerned**.

> **Being unwell, or caring for unwell children... last year I was sick for 2 weeks during a big project.**

> **Getting sick, becoming unhealthy, and loss of income.**

> **I have an illness that puts me at risk of getting very sick.**

> **I'm 64 and don't bounce back as fast as I did before.**

> **Exhaustion and over-exertion juggling numerous jobs to make ends meet.**

> **Lack of public and government investment to COVID safety.**

All Respondents

Messages to Canada Council for the Arts

In June, 2023, Michelle Chawla began her five-year term as the new Director and CEO of Canada Council for the Arts. What is your most pressing question, recommendation, or request that you would like to communicate to her and the Canada Council for the Arts?

What we heard

285 responses were received with personal anecdotes, experiences, questions, and concerns spanning a wide range of themes for Michelle Chawla, Director and CEO, along with the team at Canada Council for the Arts to reflect on.

This and the next page highlights areas related to the granting process.

Eligibility

There are artists and organizations currently ineligible for funding due to the legal status (or non-status) of their organization, or their type of work or practice falls outside CCA's definitions to apply or create a profile.

How might CCA work in consultation with the community to find solutions that support a wider range of applicants but within the scope of the CCA mandate?

Application

The application process continues to be a challenge for some, including but not limited to first-timer applicants, individuals who are neurodivergent, living with a disability or mental illness.

In addition to the Application Assistance support to hire a service provider, how could those funds be used to support the applicant for their additional labour if they prepare and submit for themself?

Can there be more alternative submission methods, such as video, audio, or interviews? How can questions be simplified?

Assessment

Navigating away from discipline-specific assessment committees is a concern for many as the context and experience within disciplines and practices provides distinct and valuable insight toward the decision-making process. The make up of the committee can also impact how the application should be written and framed.

How will CCA better engage with the community to share how decisions were made and to help inform future changes and decisions about the granting process?

All Respondents

Messages to Canada Council for the Arts (continued)

In June, 2023, Michelle Chawla began her five-year term as the new Director and CEO of Canada Council for the Arts. What is your most pressing question, recommendation, or request that you would like to communicate to her and the Canada Council for the Arts?

Application Decision

The loss of individual feedback for applications has been a challenge, stressful, and demotivating for many artists and organizations, especially for ones that have been unsuccessful multiple times. This has resulted in feelings of resentment, disengagement, and loss of transparency with the CCA.

What conditions need to be met in order for individual feedback to be reinstated? Given that feedback has been beneficial as a learning opportunity, what other sharing and learning opportunities could CCA introduce that is specific to the assessment of each program?

Funding Envelope

Increase, Stabilize, Redistribute

More than half of the responses identified an urgent need for more, and new access to, funding especially during times of rising costs for housing, labour, and general expenses, and inconsistent revenue from ticket sales, registrations, donations, and sponsorships.

Other themes included: multi-year funding, support for rural regions, a clear pathway from project to operating grants, and support for those who are between emerging and established.

Building Relationships

CCA and Community

As a national funding body, building relationships with the community it supports is essential. Further to the reflections about application feedback, there is deep curiosity about the potential for local or regional program officers who better understand the regional context in BC.

There were concerns that CCA staff were over-capacity and a recognition that an investment in staff can also support building stronger relationships with the community.

Leverage Relationships

Relational Influence

CCA is in a position where it holds many influential lines of communication across federal ministries, provincial and territorial governments and arts councils.

How can CCA use that position to improve access to and subsidies for artist housing, cultural venues and spaces? How might CCA make a case for tax relief for artists and workers? How might CCA, in partnership with the sector, build a stronger long-term strategy toward sustainability and long-term impact?

All Respondents

Sector Support Request: Funders

In 2024, if arts, culture, and heritage FUNDERS could take action to do ONE thing to prioritize supporting me, my organization, and/or our community, it would be...

What we heard

318 responses were received with thoughts on how funders can better support members of the arts, culture, and heritage community.

Many of the reflections directed at funders (including public agencies, foundations, and other funding programs) are similar to those expressed specifically toward Canada Council (p 48-49), including requests for increased funding amounts; multi-year grants, address gaps for who or what practices are eligible to receive funds; a more accessible grant application process; investment in cultural spaces and artist housing; and more grants for new applicants.

A theme that emerged throughout the responses is the role funders can, should, or are requested to play that goes beyond the practice of giving out grants. How can funders support, respond to, or coordinate efforts toward bigger ideas and initiatives based on calls-to-action from the community?

Based on the knowledge gathered by thousands of grant applications, how might funders act as a bridge or facilitator between applicants who are working on similar initiatives to encourage collaboration, shared resources and expertise?

How might funders coordinate efforts to reduce applicant labour by asking similar questions, or establishing reciprocal agreements to simplify eligibility across funders?

When final reports are required, could funders develop a standardized or simplified version that could be used across multiple funders?

How might funders share their learnings and challenges, and invite the community into the decision-making process to build a shared strategy?

All Respondents

Sector Support Request: Government

In 2024, if GOVERNMENT could take action to do ONE thing to prioritize supporting me, my organization, and/or our community, it would be...

What we heard

304 responses were received with thoughts on how the government can better support members of the arts, culture, and heritage community.

For all levels of government, across ministries and departments, **develop policies that recognize our sector** as vital to the wellbeing of society, the revitalization of communities, and as an economic driver. This includes inviting members of the arts, culture, and heritage community to exploratory and decision-making processes.

Invest in and address instability of housing and cultural spaces. B.C. has and will continue to see artists and workers move to other provinces, or to other sectors, due to the precarity of the housing market and the challenge with accessing cultural spaces to create, exhibit, or present their work. This may be through subsidies, rezoning, incentives, or other mechanisms.

Incentivize businesses and individuals to sponsor, contribute to, donate to, and participate in arts, culture, and heritage activities. Look to examples in other regions and countries.

Improve public health infrastructure with a focus on mental health and to address challenges experienced by community members, including the immunocompromised.

> **Recognize the value of the ways in which artists contribute to their communities.**

> **Prioritize arts, culture and heritage in government planning, budgets, etc.**

> **Implement a guaranteed basic income program.**

> **Incentivize landowners to share their empty spaces.**

> **Our organization acts as a community safety net for those falling through the cracks... we do not have the resources to operate properly, or the capacity to pick up social work on top of it.**

All Respondents

Sector Support Request: Arts, Culture, & Heritage Community

In 2024, if the ARTS, CULTURE, AND HERITAGE COMMUNITY could take action to do ONE thing to prioritize supporting me, my organization, and/or our community, it would be...

What we heard

265 responses were received with thoughts on how the arts, culture, and heritage community can better support its peers.

Professional Development and resources for organizational and individual development. Some specific areas of development mentioned include: change management; emergency preparedness; discipline and practice-based mentorship; fundraising; policy development; future proofing; trauma-informed practice; EDIA; board governance; leadership through ceding power. Also considerations for training beyond the beginner level; offering different learning modalities; investing in a diversity of access needs (eg. financial, language, online vs in-person, etc); and context-specific (eg. disciplines, regions, etc).

Themes of **Partnerships / relational / collaboration / interdependent systems** were highlighted as a way to reduce isolation, share resources, build a stronger community, reduce replicated strategies, and to more easily mobilize a coordinated effort when needed.

More and continued advocacy for better, accessible, and increased funding for the sector; the value of arts to society and individual wellbeing; supporting the underserved and underrepresented; and increased accessibility to venues, spaces and artist housing; better wages and increased job security.

> **Offer more opportunities for this sector to connect with each other.**

> **Advocate that our work is an essential service to society.**

> **Affordable training and accessible templates.**

> **Continue to work together with trust and respect, to build more interdependent systems that meet the community's neds.**

> **Establish collaborative platforms that encourage networking, resource-sharing, and knowledge exchange.**

All Respondents

Stress and Anxiety

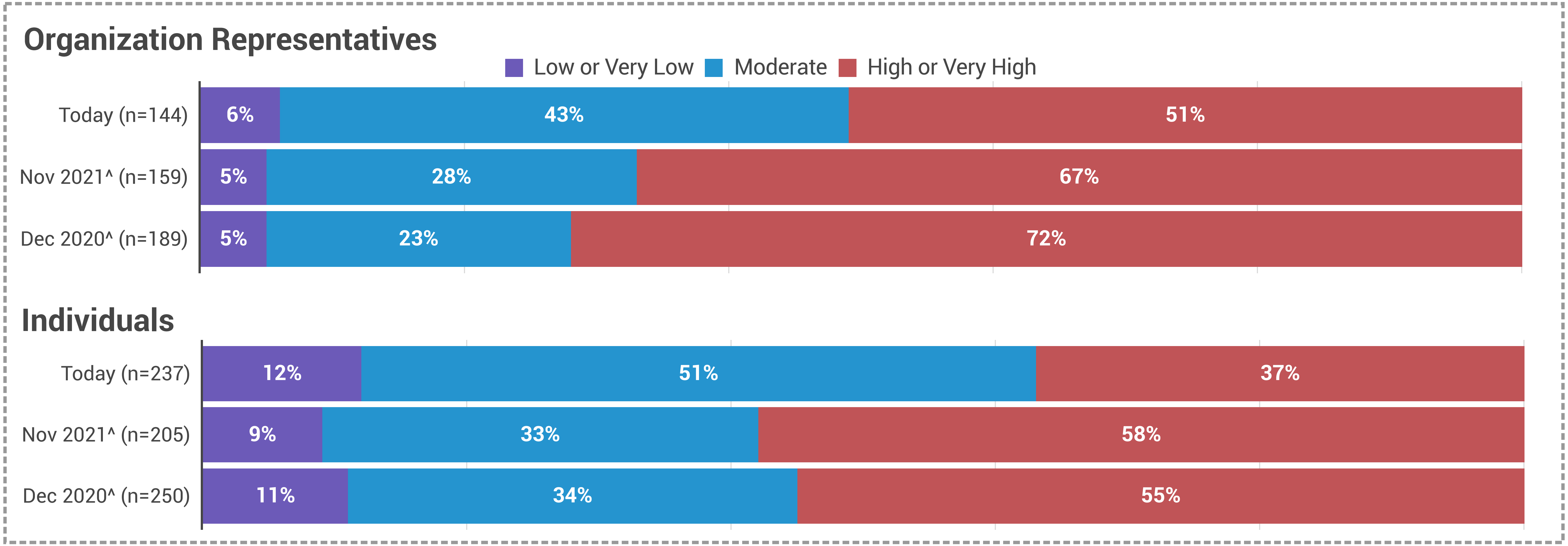
How would you describe your typical day-to-day stress and anxiety level today?

What we see

The percentage of **high or very high** levels decreased overall this year for both individuals (**⬇21 ppts**) and for organization representatives (**⬇16 ppts**), when compared to past years.

Compared to individuals (**37%**), a higher percentage of organization respondents (51%) still reported **high or very high** levels of stress or anxiety.

^Both 2020 and 2021 data represents survey responses in their respective reports.



All Respondents

Self-Optimism

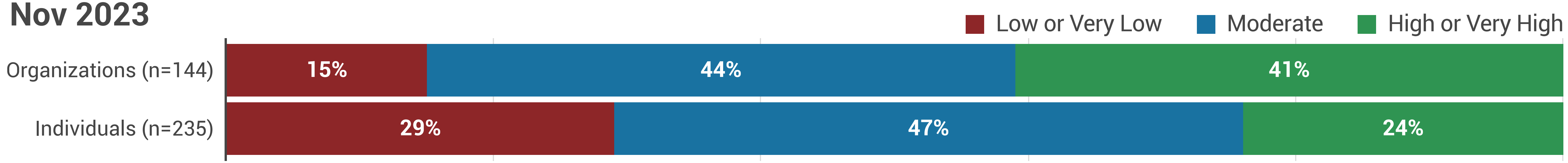
How optimistic are you that <u>your organization</u> or your <u>individual practice/work</u> will be healthy and sustainable in 2024?

What we see

Two out of five (**41%**) <u>organization respondents</u> have **high or very high** optimism that their organization will be healthy and sustainable in 2024. In contrast, less than a quarter (**24%**) of <u>individual respondents</u> have **high or very high** optimism for their practice or work.

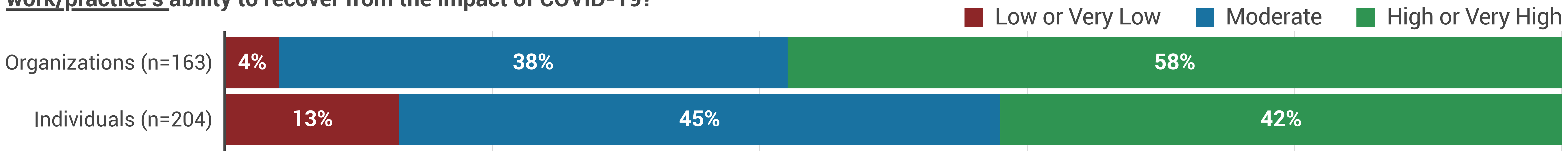
While we can't show a direct trend from a different optimism question posed in 2021 <u>related to the pandemic's impact</u>, the contrast in optimism is interesting.

Nov 2023



Responses from Nov 2021

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



All Respondents

Sector-Optimism

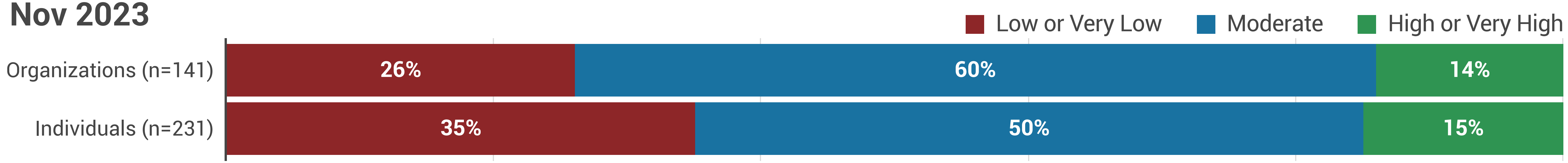
As of today, how optimistic are you that the Arts, Culture, and Heritage Sector across B.C. will be healthy and sustainable in 2024?

What we see

Almost three-quarters (**74%**) of organization respondents have **moderate** to **very high** optimism that the Arts, Culture, and Heritage sector will be healthy and sustainable in 2024. Whereas **65%** of individual respondents have **moderate** to **very high** level of optimism.

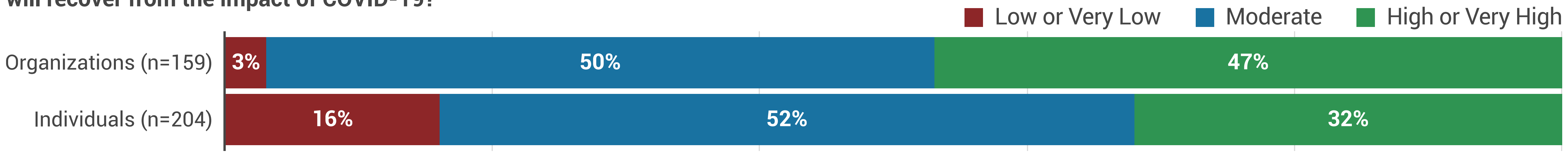
While we can't show a direct trend from a different optimism question posed in 2021 related to the pandemic's impact, the contrast in optimism is something to consider.

Nov 2023



Responses from Nov 2021

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



All Respondents

What's been positive or gone well?

Reflecting on the past six months and thinking about your presence in the arts, culture, and heritage community, what's one thing that has gone well or been positive?

I actually graduated from university in spring of this year, just about six months ago, and am currently employed in the sector.

Confidence in myself and organization

Opened a new building/facility

I feel that the little gallery I opened has received a lot of love and support from the community.

Ability to share our repatriation journey with a wider audience

Networking with my peers

Staff is happier and less depressed.

Taking myself more seriously as an artist.

New regional funding allowed us to represent more than ourselves and given us a voice to advocate for the region.

Learning to have a better life/work balance.

Learned invaluable lessons about being a curator and producer that centres intentional, person-centred work

Setting up new automated systems has reduced stress

I have moved on to a new organization and grown within my career!

Bringing forward truth and reconciliation in multiple areas.

Seeing audiences, patrons come back.

A general higher energy level from the staff, volunteers and public.

Positive feedback from others.

Increased tourism in the area

Got a novel published

I changed jobs.

I won an award

Developed better frameworks for our organization to consider HR options moving forward.

Celebrated an anniversary

Finding office space

I feel valued in my organization and my community.

Living wage and health benefits.

We survived another year

Able to hire one part-time employee last year

My health and my finances

All Respondents

What's been positive or gone well? (continued)

I prioritized my mental and physical health

Had a successful fundraiser

Received a small grant to buy supplies to create an art workshop; it sold out.

We have grown in spite of funding disappointments

Finding thriving art communities outside of the country

Positive feedback from others.

Maintained financial stability

The board, staff, and volunteers have enhanced their comprehension of diverse communities, equity, and accessibility for underserved communities.

I landed in an amazing community of writers.

The organization team makes me feel listened to and supported

We got our first grant

We raised enough money to expand the museum

I've recommitted to 'doing the work of love', regardless of the bottom line.

Receive more international support and attention for my work

We gained a lot of visibility and press through our project

Seeing audiences, patrons come back to almost pre-pandemic levels

Reopening of public spaces

We have a new board

I moved and now have SOME more opportunities and resources.

Our public engagement strategy has improved.

I retired; much less stress

Supported emerging artists with experience to continue to develop their voices

I have agency at work and I feel respected

Shown my work in 5 exhibitions in the last six months.

Centred immunoinclusivity and aimed to transform safety and community care from simply a responsibility, into a joyful practice.