



COVID-19: Impact Survey Analysis of Survey Data

CONTEXT OF SURVEY METHODOLOGY

The Artist-Run Centres and Collectives Conference/Conférence des collectifs et des centres d’artistes autogérés (ARCA) circulated an online bilingual survey in order to assess the socio-economic impact of the COVID-19 crisis on the Canadian network of artist-run centres. This initiative aimed to provide an overview of the repercussions and challenges faced by organizations operating in the artist-run centre network as a result of the implementation of social distancing measures. The information gathered will support ARCA and its allies in their efforts to assess assistance measures and devise good practices to better support members now and in the future.

A total of 74 organizations responded to the survey between March 26, 2020 and April 21, 2020.

Methodological Notes

An early version of the survey with fewer questions was mistakenly circulated to some member organizations. Three organizations responded to this version of the survey, one of which then responded to the second version of the survey. When possible, the responses of the two organizations who did not take the second version of the survey were aggregated in the analysis presented below. The French and English versions of the second survey also presented differences in some of the multiple-choice response lists. The data analysis accounted for these differences. When applicable, these discrepancies are identified in the analysis presented below. Additionally, it should be noted that two organizations responded to the survey twice; their second responses were taken into consideration for analytical purposes.

PROFILE OF SURVEY RESPONDENTS

Language

Language	# of responses	% of respondents
EN	45	60.81%
FR	29	39.19%

Membership in provincial, regional or affiliate association

	# of responses	% of survey respondents	% of members in association*
Atlantis	8	10.81%	50.00%
AGAVF	11	14.86%	57.89%
ARCCO**	11	14.86%	29.73%
AAARC	4	5.41%	30.77%
MARCC***	11	14.86%	78.57%
PAARC	9	12.16%	40.91%



PARCA	4	5.41%	30.77%
RCAAQ	22	29.73%	35.48%
Aboriginal Region	1	1.35%	33.33%
IMAA	7	9.46%	N/A
Other	7	9.46%	N/A

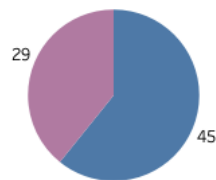
*Based on ARCA’s most recent data and including respondents added to ARCCO’s and MARCC’s member responses as outlined below.

**Data includes responses from SAW Video and Workman Arts/Rendezvous With Madness Festival.

*** Data includes responses from Plug In ICA.

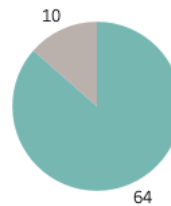
Portrait of respondents

Language



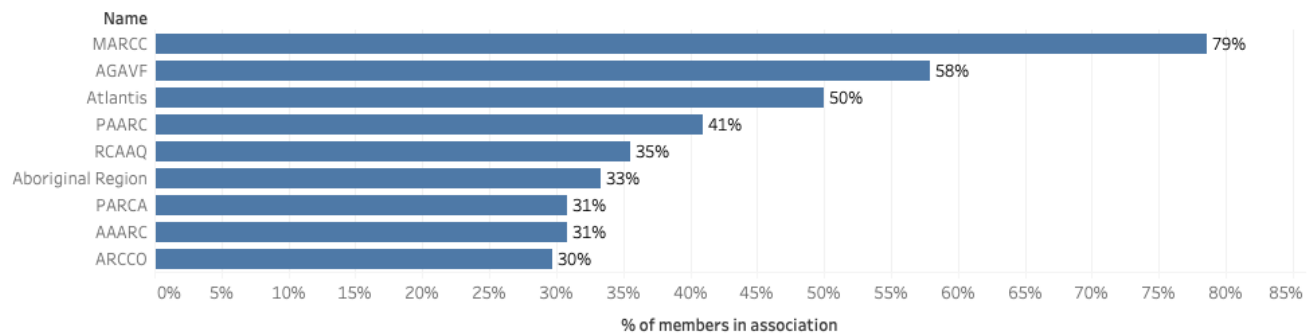
Language
 ■ EN
 ■ FR

Type of funding



Type
 ■ Organizations WITH recurring multi-year or annual operating (core) support
 ■ Organizations WITHOUT recurring multi-year or annual operating (core) support

Membership in provincial, regional or affiliate association





Type of funding

All responses

	# of responses	% of survey respondents
Organizations WITH recurring multi-year or annual operating (core) support	64	86.49%
Organizations WITHOUT recurring multi-year or annual operating (core) support	10	13.51%

Responses by membership in association (% of respondents by category)

	Atlantis	AGAVF	ARCCO	AAARC	MARCC	PAARC	PARCA	RCAAQ	IMAA
Organizations WITH recurring multi-year or annual operating (core) support	87.50%	90.91%	81.82%	75.00%	81.82%	88.89%	100.00%	90.91%	100.00%
Organizations WITHOUT recurring multi-year or annual operating (core) support	12.50%	9.09%	18.18%	25.00%	18.18%	11.11%	0.00%	9.09%	0.00%

Sources of Funding

All responses

	# of responses	% of survey respondents
Canada Council for the Arts	57	77.03%
Provincial arts council*	63	85.14%
Municipal Arts Council	54	72.97%
Canadian Heritage	23	31.08%
Other	40	54.05%
My centre receives no public funding	0	0.00%

Responses by membership in association (% of respondents by category)

	Atlantis	AGAVF	ARCCO	AAARC	MARCC	PAARC	PARCA	RCAAQ	IMAA
Canada Council for the Arts	87.50%	63.64%	72.73%	100.00%	100.00%	88.89%	75.00%	90.91%	100.00%
Provincial arts council	75.00%	81.82%	90.91%	75.00%	100.00%	66.67%	75.00%	90.91%	85.71%
Municipal Arts Council	50.00%	45.45%	72.73%	100.00%	81.82%	88.89%	75.00%	77.27%	85.71%
Canadian Heritage	50.00%	72.73%	45.45%	25.00%	36.36%	22.22%	25.00%	18.18%	57.14%
Other	25.00%	54.55%	54.55%	25.00%	63.64%	66.67%	25.00%	59.09%	42.86%



*The French survey asked respondents to distinguish between provincial arts councils located in and out of the province of Québec. Data has been aggregated for analytical purposes.

IMPACT OF COVID-19 CRISIS

Organizational closures due to social distancing measures

All responses

	# of responses	% of survey respondents
Organizations that have closed	69	93.24%
Organizations remaining open	5	6.76%
Earliest date of closure	March 8, 2020	
Latest date of closure	March 24, 2020	
Median date of closure	March 16, 2020	

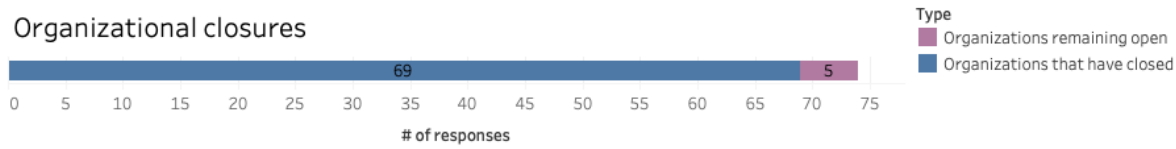
Responses by membership in association (% of respondents)

	Atlantis	AGAVF	ARCCO	AAARC	MARCC	PAARC	PARCA	RCAAQ	IMAA
Organizations that have closed	87.50%	81.82%	100.00%	100.00%	100.00%	77.78%	100.00%	100.00%	100.00%
Organizations remaining open	12.50%	18.18%	0.00%	0.00%	0.00%	22.22%	0.00%	0.00%	0.00%
Earliest date of closure	08-Mar	13-Mar	10-Mar	13-Mar	13-Mar	09-Mar	16-Mar	12-Mar	13-Mar
Latest date of closure	17-Mar	20-Mar	17-Mar	19-Mar	18-Mar	16-Mar	17-Mar	24-Mar	17-Mar
Median date of closure	16-Mar	16-Mar	14-Mar	16-Mar	16-Mar	14-Mar	17-Mar	16-Mar	16-Mar

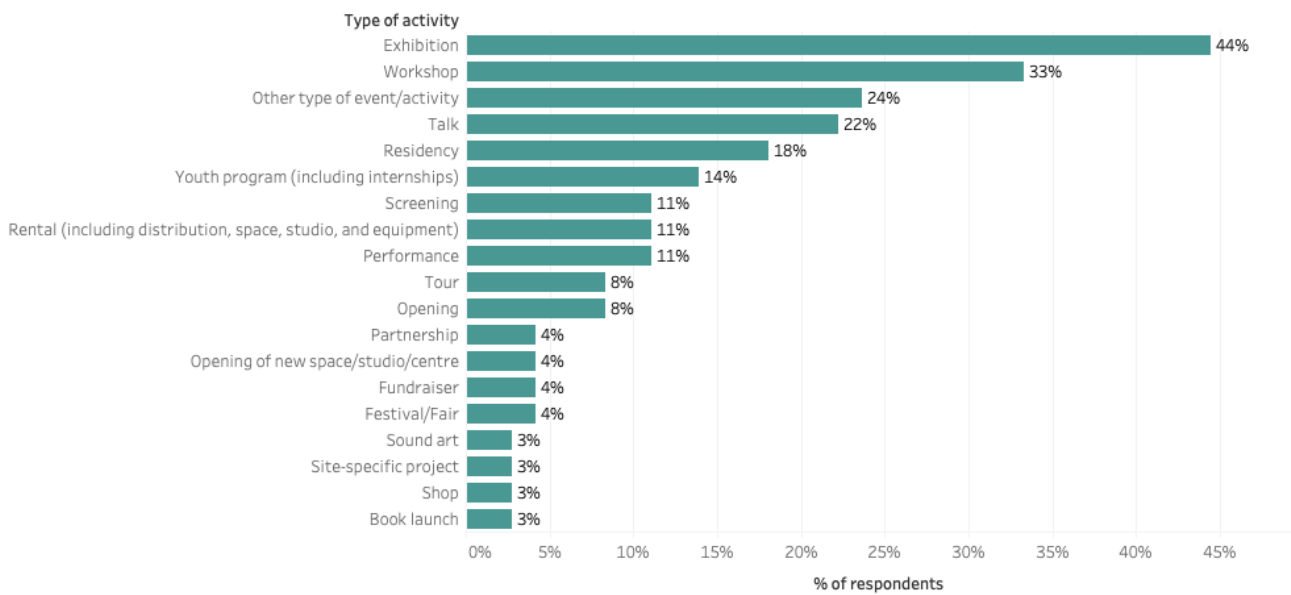


Impact of COVID-19 crisis

Organizational closures



Activities cancelled or postponed



Activities affected by social distancing measures (initial 30 day-period of self-isolation)

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

All responses

	# of responses	% of survey respondents
Organizations WITH activities affected	71	98.61%
Organizations WITHOUT activities affected	1	1.39%
Highest # of activities affected	100	
Lowest # of activities affected	1	
Average # of activities affected	10.50	
Median # of activities affected	5	
Total # of activities affected	744	



Responses by membership in association (% of respondents)

	Atlantis	AGAVF	ARCCO	AAARC	MARCC	PAARC	PARCA	RCAAQ	IMAA
Organizations WITH activities affected	100.00%	100.00%	100.00%	100.00%	100.00%	88.89%	100.00%	100.00%	100.00%
Organizations WITHOUT activities affected	0.00%	0.00%	0.00%	0.00%	0.00%	11.11%	0.00%	0.00%	0.00%
Highest # of activities affected	8	100	53	10	74	16	10	41	74
Lowest # of activities affected	2	2	2	3	2	4	3	1	4
Average # of activities affected	4.25	12.73	10.36	6.00	18.27	6.88	6.5	8.64	19.86
Median # of activities affected	4	4	4	5.5	12	5	6.5	5	10
Total # of activities affected	34	140	114	24	201	55	13	190	139

Information about activities affected by social distancing measures (initial 30 day-period of self-isolation)

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

The information provided by respondents indicates that, in the initial 30-day period of self-isolation, 7 organizations (9.72% of respondents) cancelled all activities, 6 organizations (8.33% of respondents) postponed all activities, and 45 (62.50% of respondents) experienced a mix of cancellations, postponements, and/or alterations to the delivery format of their activities. Of note, 3 organizations (4.41% of respondents) indicated that projects presented outdoors or in public space had not been impacted by the crisis.

In order of importance, respondents indicated that the following activities had been cancelled or postponed, without mention of an alternative format:

Type of activity	# of respondents	% of respondents
Exhibition	32	44.44%
Workshop	24	33.33%
Other type of event/activity	17	23.61%
Talk	16	22.22%
Residency	13	18.06%
Youth program (including internships)	10	13.89%
Performance	8	11.11%
Screening	8	11.11%
Rental (including distribution, space, studio, and equipment)	8	11.11%
Opening	6	8.33%



Tour	6	8.33%
Festival/Fair	3	4.17%
Fundraiser	3	4.17%
Partnership	3	4.17%
Opening of new space/studio/centre	3	4.17%
Book launch	2	2.78%
Site-specific project	2	2.78%
Sound art	2	2.78%
Shop	2	2.78%

Honouring of commitments in the case of cancellations or postponements of contracts (initial 30 day-period of self-isolation)

Respondents were asked if, in the case of cancellations or postponements of contracts, they were honouring their commitments with regard to artists, self-employed workers, and freelancers for the payment of fees, honoraria, and royalties.

All responses

	# of responses	% of survey respondents
Yes	47	63.51%
No	1	1.35%
Partially	22	29.73%
I don't know	4	5.41%

Responses by type of funding (% of respondents by category)

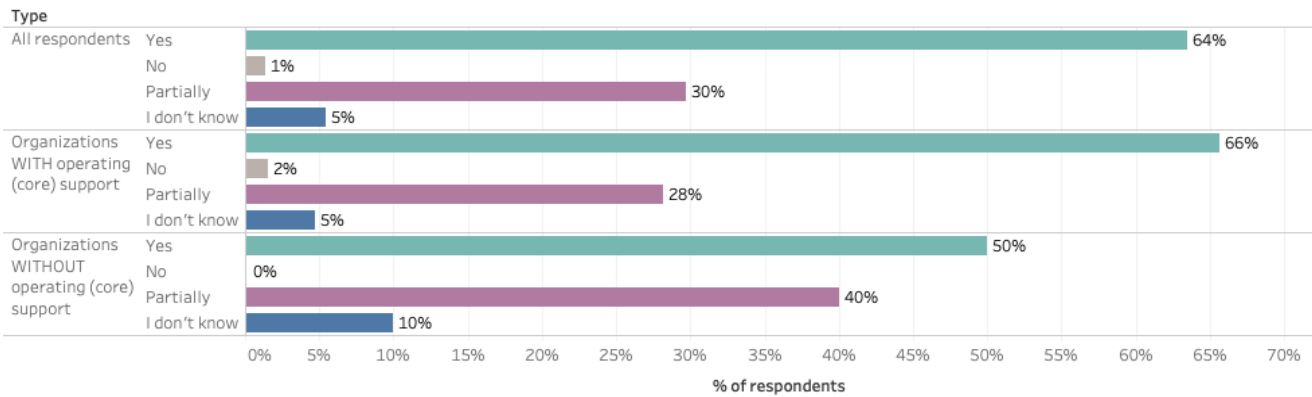
	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Yes	65.63%	50.00%
No	1.56%	0.00%
Partially	28.13%	40.00%
I don't know	4.69%	10.00%

A higher percentage of respondents with operating (core) support indicated a willingness to honour their commitments to artists, self-employed workers, and freelancers in the initial 30-day period of self-isolation. A higher percentage of respondents without operating (core) support indicated a willingness to partially honour their commitments to artists, self-employed workers, and freelancers in the initial 30-day period of self-isolation.



Impact on artists, self-employed workers, and freelancers

Honouring of commitments in the case of cancellations or postponements of contracts



Fees paid to mitigate the impact of closure measures on self-employed collaborators (initial 30 day-period of self-isolation)

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

Respondents were asked to quantify the sum of fees paid to mitigate the impacts of organizational closures on self-employed collaborators, including artists, for the initial 30-day period of self-isolation.

All responses

	# of responses	% of survey respondents
Less than \$1,000	18	25.00%
Between \$1,000 and \$5,000	35	48.61%
Between \$5,000 and \$10,000	7	9.72%
More than \$10,000	3	4.17%
I don't know	4	5.56%
Other*	5	6.94%



On average, respondents indicated having paid between <\$1,000 and \$5,000 in fees.
 The total sum of fees paid by survey respondents is approximately between \$100,000 and >\$292,940.

Responses by type of funding (% of respondents by category)

	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Less than \$1,000	20.97%	50%
Between \$1,000 and \$5,000	54.84%	10 %
Between \$5,000 and \$10,000	8.06%	20%
More than \$10,000	4.84%	0%
I don't know	4.84%	10%
Other*	6.45%	10%

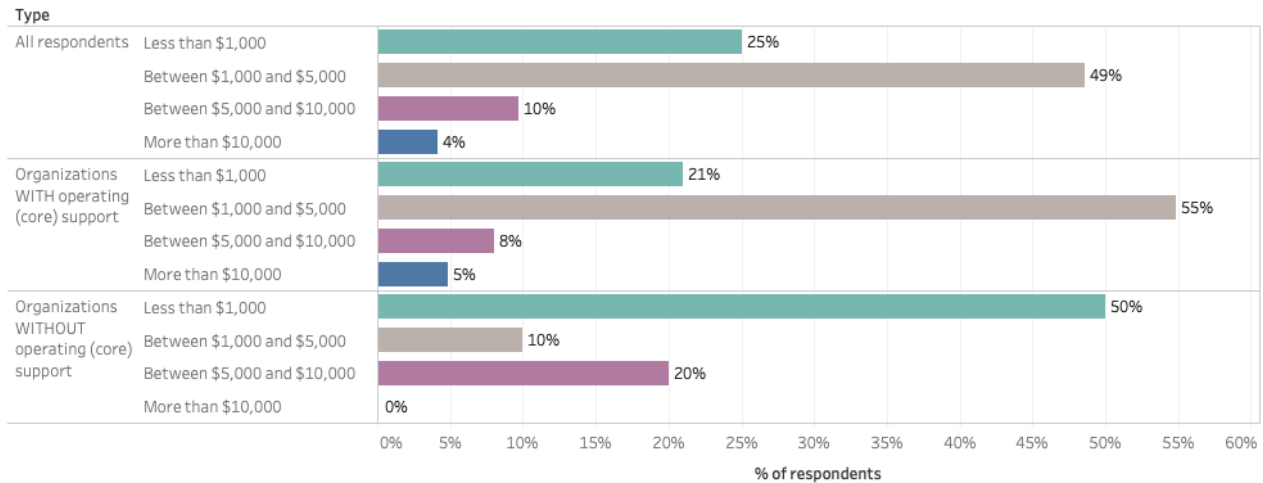
On average, respondents with operating (core) support indicated having paid a higher amount of fees.

*The French survey did not provide respondents with “other” as a response choice.

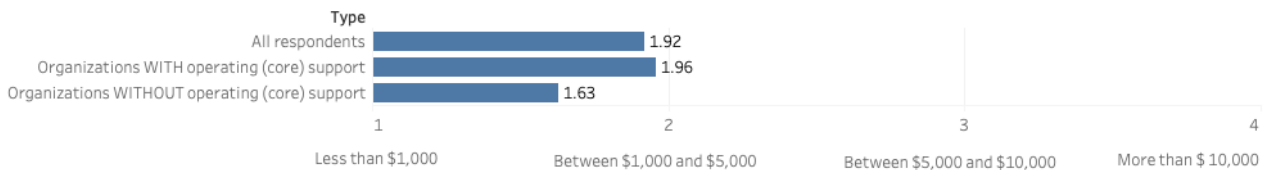


Impact on artists, self-employed workers, and freelancers

Fees paid to mitigate the impact of closure measures on self-employed collaborators



Average fees paid to mitigate the impact of closure measures on self-employed collaborators



Alternative delivery of programs and services

The information provided by respondents indicates that 55 organizations (74.32% of respondents) had already implemented, or were considering implementing, alternative delivery formats for programming and services. Of note, 49 organizations (66.22% of respondents) indicated having used, or were considering using, online tools/formats to present programming, deliver services, and communicate with their membership and communities.

In order of importance, respondents indicated having used, or were considering using, the following alternative formats:

	Type of activity	# of respondents	% of respondents
Online formats and tools	Other	15	20.27%
	Exhibition	7	9.46%
	Workshop	6	8.11%



	Social media	6	8.11%
	Streaming or rental of audiovisual content	6	8.11%
	Works made for digital presentation	4	5.41%
	Talk	3	4.05%
	Virtual tour	3	4.05%
	Fundraising	3	4.05%
	Residency	2	2.70%
	Shop	2	2.70%
Other formats and tools	Other	15	20.27%
	Residencies	4	5.41%
	Communications	4	5.41%
	Member services	3	4.05%

Examples of activities listed under “online tools and formats” include: an exhibition opening, a live-streamed performance, the online presentation of touring programs, processes to make equipment available to members, a digital conversation series, critique sessions using video-conferencing software, an interactive website, a jury meeting, and the provision of technical support.

Examples of activities listed under “other formats and tools” include: an emergency relief fund, mail-order distribution and mail art, the commissioning of artists’ books, requests for community members to save the work produced during the crisis for an upcoming exhibition, workshops offered by mail or telephone, a radio show, mentorships, and the production of resources.

Impact of social distancing measures on human resources

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

Respondents were asked to identify the impact of social distancing measures on their organization’s human resources.

All responses

	# of responses	% of survey respondents
Dismissals (permanent termination of employment relationship)	1	1.39%
Layoffs (temporary suspension of employment contract)	16	22.22%
Postponed internship hires	24	33.33%
Increase in working from home	65	90.28%
Other	17	23.61%

The vast majority of respondents indicated increased levels of working from home as a result of implementing social distancing measures. A third of respondents indicated having had to postpone internship hires. Less than a



quarter of respondents indicated having had to lay off employees. Of note, only one respondent indicated having had to dismiss employees.

Responses by type of funding (% of respondents by category)

	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Dismissals (permanent termination of employment relationship)	1.61%	0.00%
Layoffs (temporary suspension of employment contract)	20.97%	30.00%
Postponed internship hires	35.48%	20.00%
Increase in working from home	93.55%	70.00%
Other	11.29%	10.00%

A higher percentage of respondents with operating (core) support indicated having postponed internship hires and increased levels of working from home as a result of implementing social distancing measures. A higher percentage of respondents without operating (core) support indicated having had to lay off employees.

Measures put in place to mitigate impact of social distancing measures on human resources

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

Respondents were asked to provide information about measures put in place to mitigate the impact of social distancing measures on human resources. In order of importance, respondents provided information about the following topics:

Type of activity	# of respondents	% of respondents
Communications	22	30.56%
Working conditions (other than working from home)	20	27.78%
Working from home	19	26.39%
No impact/minimal impact	5	6.94%
Wage subsidy and possible layoffs	4	5.56%

Communications

Respondents stressed the importance of maintaining communication channels open (between members of the staff, board of directors, and/or committees), of holding meetings on a regular basis, and of deploying efforts to maintain a connection and sense of belonging between members of the team. All of the respondents who provided information about communications discussed holding regular meetings via (mostly) videoconferencing tools and/or phone. Some respondents indicated that they had had to purchase software/digital tools in order to facilitate videoconferencing meetings and remote working strategies.



Working conditions (other than working from home)

Several respondents indicated maintaining, planning on maintaining, or desiring to maintain staff employment (some with full pay despite lowered working hours). Some respondents indicated having had to reduce working hours and/or expectations of the staff's productivity in order to accommodate work-at-home situations and a reduced workload. The reduction of stress and the maintenance of the staff's mental health was also mentioned by some. With regard to the payment of artists' fees, one respondent indicated having provided artists with "kill fees" to compensate for the cancellation of events, one respondent indicated providing extra fees to artists/curators to compensate for the additional time required, another indicated postponing the payment of artists' fees for performances along with the postponement of the events at the artists' requests. When physical presence at the office/centre is required, respondents indicated having put in place measures to coordinate visits and ensure that one person at a time was on site. Other measures related to staff payment and contracts include:

- Looking into partially funding a staff member's phone plan
- Using up vacation time, laying off staff, and making some positions part time
- Paying technicians with the expectations that unworked hours will be recuperated at a later date
- Unanimously deciding to lay off all staff as they were eligible for employment insurance
- Maintenance of volunteer labour to accomplish essential tasks
- Continuing to pay contract-based student employees until the end of their contracts (late April)
- Postponing contracts with service providers

Working from home

Other than providing information about communication measures as mentioned above, respondents discussed the following measures:

- Implementing work-at-home agreements with staff
- Finding different tasks for employees to accomplish at home in the event that their regular tasks cannot be accomplished remotely
- Working from home only to wrap loose ends before closing
- Encouraging staff to take home work equipment (computers and technical material)
- Using cloud solutions for file storage and access

No impact/minimal impact

Some respondents indicated that social distancing measures had had no, or minimal, impact on their staff's working conditions as they already worked from home, worked alone, or were accustomed to working from home.

Wage subsidy and possible layoffs

Some respondents indicated looking into, or pursuing the federal 75% wage subsidy program, and possibly needing to lay off staff or otherwise cut labour costs if they were unable to access this support. One respondent indicated not being eligible for the federal wage subsidy program due to its non-profit status and stressed the need for advocacy in this area. Another respondent indicated potentially having to lay off staff depending on the duration of the crisis.



Financial impact of social distancing measures: non-recoverable costs (initial 30 day-period of self-isolation)

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

Respondents were asked to identify the sum of non-recoverable costs incurred by their organization (salaries, overhead, contingency plans, communications, transition to cloud computing, travel cancellations, etc.) for the initial 30-day period of self-isolation.

All responses

	# of responses	% of survey respondents
Less than \$1,000	22	30.56%
Between \$1,000 and \$5,000	26	36.11%
More than \$5,000*	15	20.83%
I don't know	6	8.33%
Other**	3	4.17%

On average, respondents indicated that the sum of non-recoverable costs incurred by their organization was between <\$1,000 and \$5,000. The total sum of non-recoverable costs incurred by survey respondents is approximately between \$116,000 and >\$276,945.

Responses by type of funding (% of respondents by category)

	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Less than \$1,000	27.42%	50.00%
Between \$1,000 and \$5,000	35.48%	40.00%
More than \$5,000*	22.58%	10.00%
I don't know	9.68%	0.00%
Other**	4.84%	0.00%

On average, respondents with operating (core) support indicated having incurred a higher amount of non-recoverable costs.

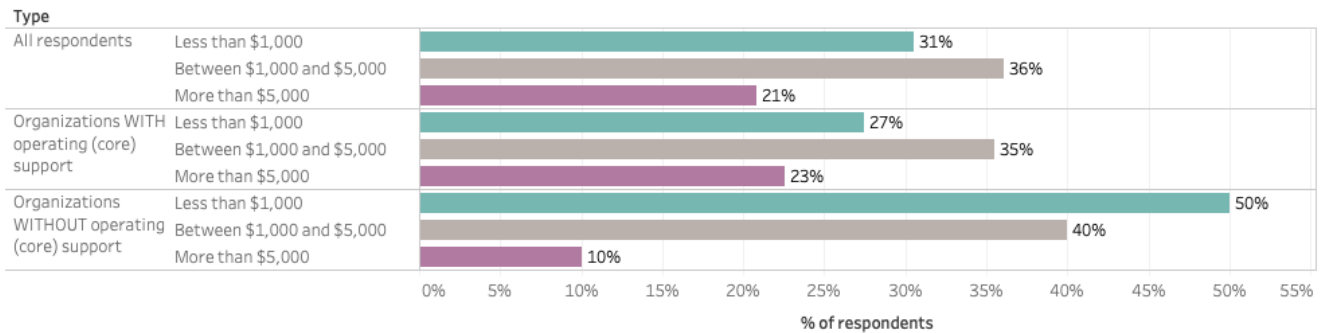
*Data is aggregated from the two following response choices provided in the English survey: \$5,000–\$10,000 and >\$10,000.

** The French survey did not provide respondents with “other” as a response choice.

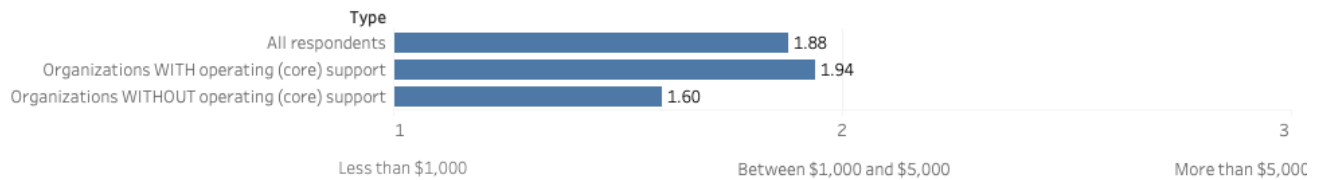


Financial impact of social distancing measures

Sum of non-recoverable costs



Average sum of non-recoverable costs



Financial impact of social distancing measures: anticipated loss of earned revenue (initial 30 day-period of self-isolation)

Respondents were asked to identify the total value of anticipated loss of earned revenue for the initial 30-day period of self-isolation and to quantify this amount in relation to their organization’s overall revenue.

All responses: value of anticipated loss of earned revenue

	# of responses	% of survey respondents
Less than \$1,000	19	25.68%
Between \$1,000 and \$5,000	34	45.95%
Between \$5,000 and \$10,000	9	12.16%
More than \$10,000	5	6.76%
I don't know	7	9.46%



All responses: percentage of organization’s overall revenue

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

	# of responses	% of survey respondents
Less than 10%	48	66.67%
Between 10% and 25%	13	18.06%
Between 25% and 50%	3	4.17%
More than 50%	2	2.78%
I don't know	6	8.33%

On average, respondents indicated that the total value of their anticipated loss of earned revenue was between \$1,000 and \$5,000. On average, respondents indicated that this amount represents between <10% and 25% of their organization’s overall revenue. The total value of respondents’ anticipated loss of earned revenue is approximately between \$129,000 and >\$328,938.

Responses by type of funding: value of anticipated loss of earned revenue (% of respondents by category)

	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Less than \$1,000	28.13%	10.00%
Between \$1,000 and \$5,000	43.75%	60.00%
Between \$5,000 and \$10,000	12.50%	10.00%
More than \$10,000	6.25%	10.00%
I don't know	9.38%	10.00%

Responses by type of funding: percentage of organization’s overall revenue (% of respondents by category)

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

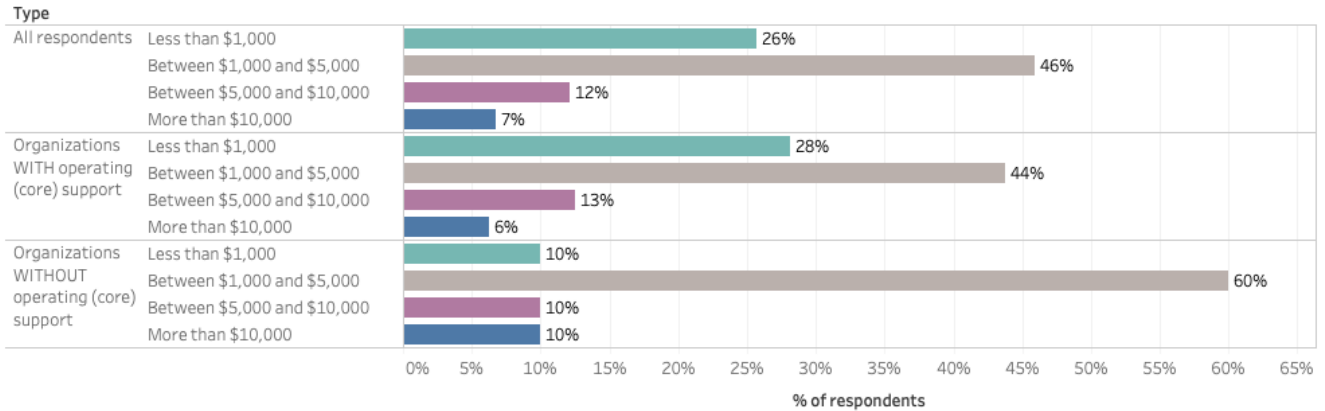
	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Less than 10%	70.97%	40.00%
Between 10% and 25%	17.74%	20.00%
Between 25% and 50%	3.23%	10.00%
More than 50%	1.61%	10.00%
I don't know	6.45%	20.00%

On average, respondents without operating (core) support indicated anticipating a higher loss of earned revenue. On average, respondents without operating (core) support also indicated that the total value of anticipated loss of earned revenue represented a higher percentage of their organization’s overall revenue.

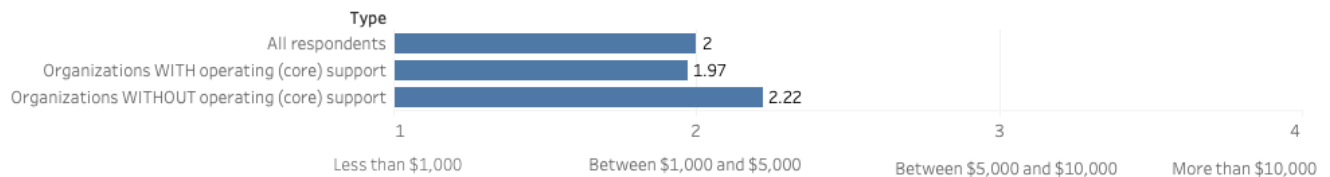


Financial impact on organizations

Total value of anticipated loss of earned revenue



Average total value of anticipated loss of earned revenue



Financial impact of social distancing measures: cash flow problems

Respondents were asked if, in the event that the closure of their organization extended beyond the initial 30-day period of self-isolation, they would likely to face cash flow problems. Respondents who indicated likely facing cash flow problems were asked to quantify them.

All responses: anticipated cash flow problems

	# of responses	% of survey respondents
Yes	26	35.14%
No	32	43.24%
I don't know	16	21.62%

All responses: anticipated scale of cash flow problems

	# of responses	% of respondents anticipating cash flow problems
Less than \$5,000	5	19.23%



Between \$5,000 and \$10,000	3	11.54%
Between \$10,000 and \$20,000	6	23.08%
More than \$20,000	8	30.77%
I don't know	4	15.38%

More than a third of respondents indicated likely facing cash flow problems. On average, anticipated cash flow problems were between \$5,000 and \$20,000.

Responses by type of funding: anticipated cash flow problems (% of respondents by category)

	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Yes	31.25%	60.00%
No	48.44%	10.00%
I don't know	20.31%	30.00%

Responses by type of funding: anticipated scale of cash flow problems (% of respondents by category and anticipating cash flow problems)

	Organizations WITH recurring multi-year or annual operating (core) support	Organizations WITHOUT recurring multi-year or annual operating (core) support
Less than \$5,000	20.00%	16.67%
Between \$5,000 and \$10,000	5.00%	33.33%
Between \$10,000 and \$20,000	25.00%	16.67%
More than \$20,000	30.00%	33.33%
I don't know	20.00%	0.00%

A higher percentage of respondents without operating (core) support indicated likely facing cash flow problems. On average, cash flow problems anticipated by organizations with operating (core) support were larger than that anticipated by organizations without operating (core) support.

Additional information: impacts of COVID-19 crisis

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

Respondents were asked to provide information about what they anticipated being the greatest impact of the COVID-19 crisis on their organization. In order of importance, respondents provided information about the following spheres of activity:



Impacted sphere	# of responses	% of survey respondents
Financial impacts	28	38.89%
Impacts on programming	27	37.50%
Impacts on organization's community	14	19.44%
Impact on organization's operations and governance	10	13.89%
Other	3	4.17%

Financial impacts

More than one third of respondents indicated anticipating financial impacts. The majority of respondents who noted financial impacts indicated anticipating losses in earned and fundraising revenue. Several respondents anticipated important losses in earned revenue as a result of a decline in rentals (including space, facilities, and equipment). A number of respondents also indicated having had to cancel or alter important fundraising events or campaigns as a result of the crisis. A few respondents also indicated having lost sponsorship revenue as a result of event cancellations, loss of sales revenue as a result of closures, and loss of Gaming revenue as a result of decreased use of gaming facilities (e.g. casinos).

Impacts on programming

More than one third of respondents indicated anticipating impacts on their programming. Negative impacts on programming as a result of organizational closures and event cancellations and postponements were top of mind for many respondents. In addition to the complications caused by having to cancel or delay programming, respondents identified impacts in terms of loss of momentum, decline in audience participation, lack of capacity to fulfill their organization's mission, and issues regarding the possibility of working with international collaborators in the near future.

Impacts on organization's community

Respondents indicated being impacted by the loss of human contact, by the potential loss of membership, and by the decreased level of contact with members of their community. Several respondents indicated a lack of capacity to provide core services or having had to alter their services as a result of the crisis. In turn, respondents indicated that a decreased offer of services (including access to equipment and space, production support, workshops, and classes) negatively impacted their members and community. In particular, respondents indicated that vulnerable populations were impacted due to increased isolation and lack of access to resources.

Impacts on organization's operations and governance

Respondents indicated being impacted by logistical challenges as a result of the crisis, which have put increased pressure on staff and board members. A few respondents identified impacts related to space, including the possibility of losing their current location and the necessity to postpone renovations or the launch of a new location. At the level of governance, respondents indicated that the crisis interfered with their strategic planning process and had interrogations as to how to organize an AGM.

Other

On a more positive note, some respondents indicated that the crisis had provided them with the time to undertake projects to which they had not been able to devote resources, or to devote their time to research, reflection, and planning.



Additional information: respondents’ greatest concerns

Data excludes responses provided to the early version of the survey for lack of equivalent question(s).

Respondents were asked to provide information about their greatest concerns in relation to the COVID-19 crisis. In order of importance, respondents provided information about the following spheres of activity:

Sphere of concern	# of responses	% of survey respondents
Financial	29	40.28%
Health and safety	20	27.78%
Human resources	14	19.44%
Programming	14	19.44%
Community	13	15.28%
Organization’s operations	2	2.78%

Financial concerns

More than one third of respondents indicated having concerns of a financial nature. Respondents were concerned about the sustainability of their operations, loss of revenue, and cash flow. A majority of respondents were concerned about the long-term impacts of the COVID-19 crisis on their organization’s financial stability and their future capacity to access funding. A number of respondents indicated being concerned about their future ability to apply for, and obtain, operating, project, and capital funding as a result of having had to cancel or postpone programs, being unable to diversify revenue sources due to the loss of earned revenue, and seeing their attendance and service statistics drop due to organizational closures. In particular, organizations who are financially unstable or who depend on project funding were concerned about the impact of their current inability to deliver programs on their future capacity to secure grant revenue. Moreover, many respondents were preoccupied with the overall potential economic impact of the current crisis, which could result in governments implementing austerity measures, cutting programs, and reducing funding to the cultural sector. Respondents were also concerned about the financial impact of the crisis on funding offered by private foundations, on funding provided through Gaming programs, and on their long-term capacity to generate earned revenue as a result of diminished audiences in the event of continued limitations placed on public gatherings and/or the public’s fear of visiting public spaces.

Health and safety

More than one quarter of respondents indicated being concerned for the health, safety, and wellbeing of those around them, including their organization’s staff, board members, membership, and larger community.

Human resources

Several respondents were concerned about the potential impacts of the crisis on their organization’s human resources. Respondents indicated fearing the necessity of having to lay off staff or terminate certain positions in the event of continued or long-term financial losses (e.g. in the event that funding is diminished). Respondents also indicated being concerned for the welfare and livelihood of artists and collaborators.

Programming

Several respondents indicated being concerned about their organization’s programming activities as a result of organizational closures and event cancellations and postponements. Respondents noted the complications



caused by the necessity to reschedule events and indicated having difficulty planning for the medium and long term. Some respondents indicated being concerned with the need to adjust their programs to remain relevant to their communities and continue delivering services and programming. Some respondents indicated a concern for audience retention and participation in the aftermath of the COVID-19 crisis and wondered if the public will want to congregate at events in the future. One respondent expressed concern about their lack of capacity to complete projects for which they received funding.

Community

A number of respondents were concerned about not being able to provide services to their members or not being able to respond to the needs of their communities during the crisis. Other participants were concerned for the welfare and wellbeing of their members and communities, recognizing that many artists were facing a loss of income as a result of the crisis. Respondents who operate in, or provide services to, vulnerable communities expressed concern about how the crisis would impact these populations. One respondent indicated being concerned for the future of the cultural sector in the aftermath of the crisis while another was concerned about the financial impact of the crisis on businesses whose activities intersect with that of their organization.

Operations

Some respondents expressed concerns about logistical issues.