



CONCLUSIONS

A total of 74 organizations responded to the survey between March 26, 2020 and April 21, 2020. The average participation rate across ARCA's regions was 43.05%.

The vast majority of respondents (87%) are organizations with recurring multi-year or annual operating (core) support from one or multiple levels of government.

Organizational closures due to social distancing measures

Almost all organizations (93%) indicated having closed as a result of social distancing measures. The median date of closure was March 16, 2020.

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

In the initial 30-day period of self-isolation, all but one organization (99%) reported having seen their activities affected by social distancing measures. In total, respondents indicated that more than 740 activities had been affected, with a median of 5 activities per organization.

Nearly half (44%) of respondents indicated having had to cancel or postpone exhibitions while a third (33%) indicated having had to cancel or postpone workshops. Nearly one in five respondents indicated having had to cancel or postpone talks (22%) and residencies (18%). More than one in ten respondents indicated having had to cancel or postpone youth programs (14%), performances (11%), screenings (11%), and rental services (including distribution, space, studio, and equipment) (11%).

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

In the case of cancellations or postponements of contracts, over half of respondents (64%) indicated honouring their commitments with regard to artists, self-employed workers, and freelancers for the payment of fees, honoraria, and royalties. Organizations with recurring multi-year or annual operating (core) support were more likely to honour their commitments.

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

In the initial 30-day period of self-isolation, on average, respondents indicated having paid between <\$1,000 and \$5,000 in fees to mitigate the impacts of organizational closures on self-employed collaborators, including artists. On average, respondents with operating (core) support indicated having paid a higher amount of fees. The total sum of fees paid by survey respondents is approximately between \$100,000 and >\$292,940.

Alternative delivery of programs and services

Nearly three quarters of organizations (74%) had already implemented, or were considering implementing, alternative delivery formats for programming and services. Of note, more than half of respondents (66%) indicated having used, or were considering using, online tools/formats to present programming, deliver services, and communicate with their membership and communities.

Impact of social distancing measures on human resources



The vast majority of respondents (90%) indicated increased levels of working from home as a result of social distancing measures. A third of respondents (33%) indicated having had to postpone internship hires. Less than a quarter of respondents (22%) indicated having had to lay off employees. Of note, only one respondent indicated having had to dismiss employees. Organizations without recurring multi-year or annual operating (core) support were more likely to lay off employees.

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

In the initial 30-day period of self-isolation, on average respondents indicated that the sum of non-recoverable costs incurred by their organization was between <\$1,000 and \$5,000. Respondents with operating (core) support were more likely to have incurred a higher amount of non-recoverable costs. The total sum of non-recoverable costs incurred by survey respondents is approximately between \$116,000 and >\$276,945.

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

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. Organizations without operating (core) support were more likely to anticipate a higher loss of earned revenue. This amount was also more likely to represent a higher percentage of their organization's overall revenue. The total value of respondents' anticipated loss of earned revenue is approximately between \$129,000 and >\$328,938.

Financial impact of social distancing measures: cash flow problems

More than a third of respondents (35%) indicated likely facing cash flow problems in the event that the closure of their organization extended beyond the initial 30-day period of self-isolation. On average, anticipated cash flow problems were between \$5,000 and \$20,000. Organizations without operating (core) support were more likely to face cash flow problems but the average scale of cash flow problems anticipated by organizations with operating (core) support was larger.

Additional information: impacts of COVID-19 crisis

Financial impacts

More than one third of respondents (39%) 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 (38%) 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.

Additional information: respondents' greatest concerns

Financial concerns

More than one third of respondents (40%) indicated having concerns of a financial nature. 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.

Human resources

Nearly one in five respondents (19%) 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

Nearly one in five respondents (19%) 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.