

ARTSFUND 

# COVID CULTURAL IMPACT STUDY

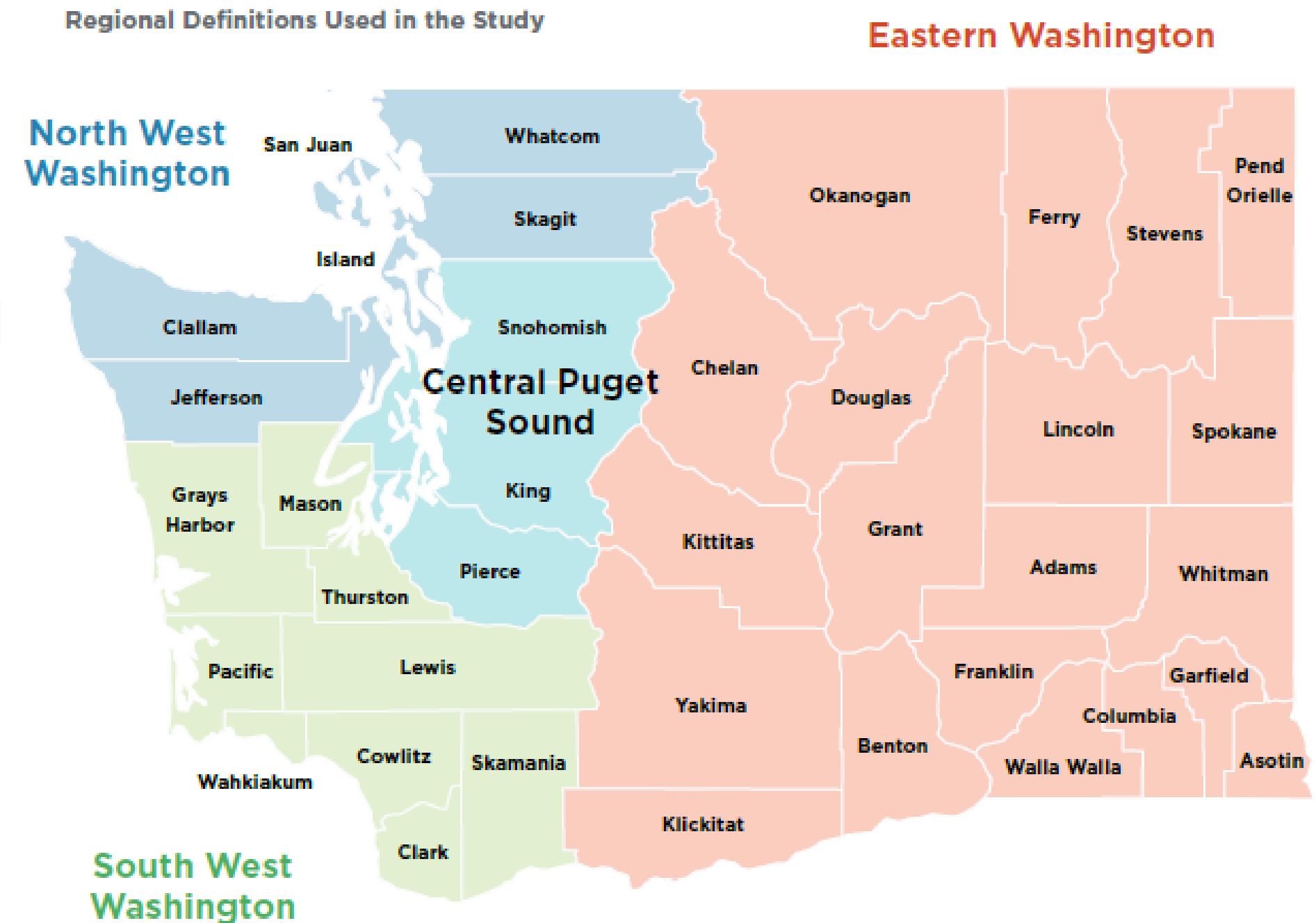
*Presentation for:  
King County Council  
Committee of the Whole  
February 16, 2022*

Photo Credit: Youth in Focus, Creative Career Cohort class 2021, photo courtesy of Youth in Focus



# OVERVIEW & METHODOLOGY

- **Nonprofit Organizational Survey:** 212 nonprofit cultural organizations from across the state, with 121 reporting financial data
- **Cultural Participant Survey:** 737 adults who had attended at least ONE cultural program since March 2020
- **Statewide Omnibus Poll:** 874 adults from Washington, representative of the state

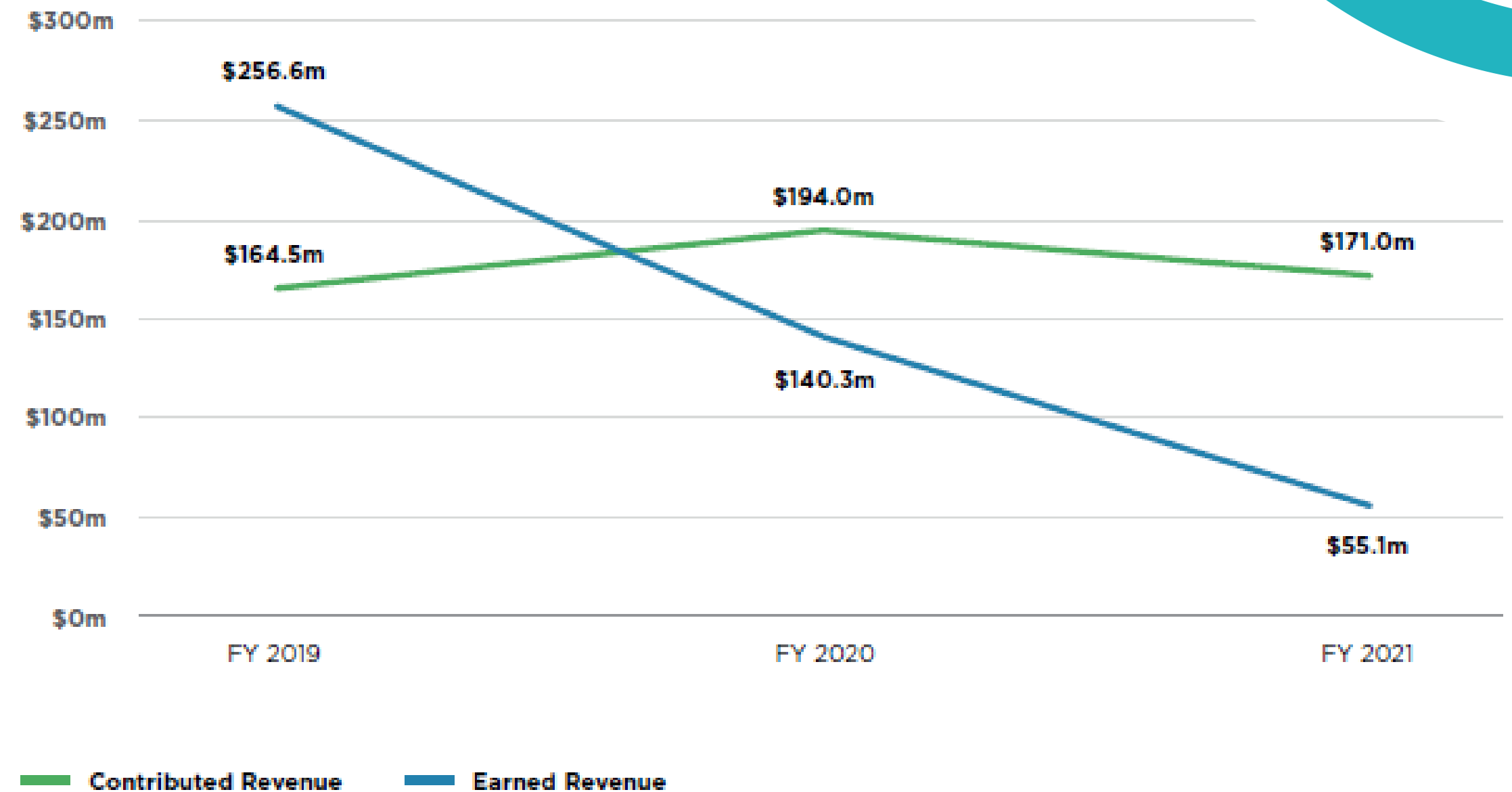


# FINANCIAL IMPACTS

## Revenue & Budget Loss

- **\$95.9M loss** in overall revenue between FY2019 and FY2020.
  - **\$131.6M decrease** in earned revenue and **\$35.7M increase** in contributed revenue.

Nonprofit Cultural Organization Revenue



Source: ArtsFund CCIS Non-profit Organizational Survey, 2021; BERK, 2021.



# FINANCIAL IMPACTS

## Patron Spending

- **47%** of statewide poll respondents, say they plan to continue virtual participation in the near term
- They are also expecting to spend about **50% less** of what they spent prior to March 2020



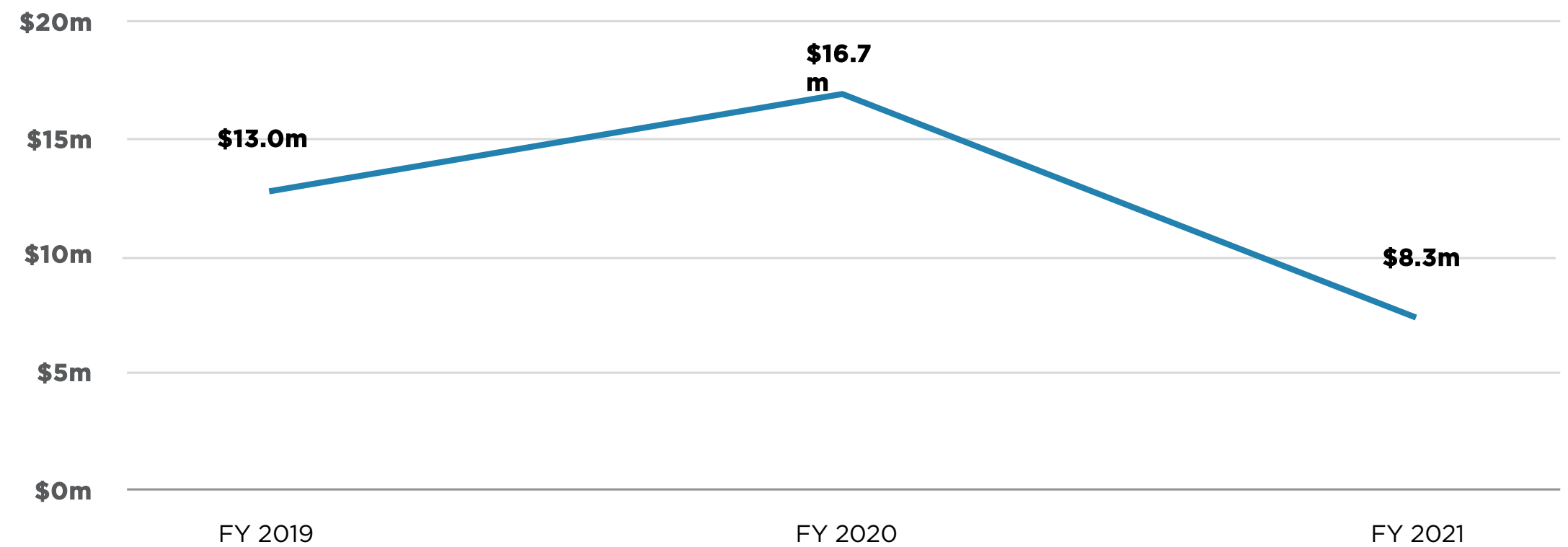


# FINANCIAL IMPACTS

## Impacts on Black, Indigenous, and other People of Color-Identifying Organizations

- **29% increase** in contributed revenue between FY 2019 and FY2020.
- **50% decrease** projected in FY 2021.

Total Contributed Revenue Among BIPOC-identifying organizations



Source: ArtsFund CCIS Non-profit Organizational Survey, 2021; BERK, 2021.

# FINANCIAL IMPACTS

## Access to Pandemic Relief

- **93%** of organizations received some type of pandemic relief funding.
- The **top three** relief programs accessed were funded by public sources.

	King	Central Puget Sound (Including King)	Eastern Washington	North West Washington	South West Washington
<b>Average Number of Sources Accessed</b>	<b>4.23</b>	<b>4.12</b>	<b>3.23</b>	<b>4.44</b>	<b>2.75</b>
Nonprofit Community Recovery (NCR) Grants (ArtsFund and the Department of Commerce)	75%	75%	77%	89%	75%
Public Statewide Emergency Relief Funds (e.g. ArtsWA, Department of Commerce, Humanities Washington, etc.)	63%	62%	38%	67%	25%
Paycheck Protection Program (PPP)	63%	62%	23%	44%	38%
Other Local/Regional Emergency Relief Funds (e.g. ArtsFund COVID Emergency Relief Fund, etc.)	50%	48%	38%	44%	25%
Public Local/Regional Emergency Relief Funds (e.g. county or city arts agencies)	54%	49%	8%	44%	0%
CARES Act Relief Funding DIRECTLY from a Federal Source (e.g. IMLS, NEA, NEH, etc.)	39%	37%	46%	33%	50%
Shuttered Venue Operators Grant (SVOG)	22%	21%	23%	22%	25%
Economic Injury Disaster Loan (EIDL)	19%	19%	23%	44%	13%
Employee Retention Credit	20%	21%	0%	22%	0%
Other Statewide Emergency Relief Funds (e.g. All In Washington, etc.)	0%	9%	23%	22%	25%

Source: ArtsFund CCIS Non-profit Organizational Survey, 2021; BERK, 2021.



# WORKFORCE IMPACTS

## Furloughs and Rehiring

- **41%** of organizations furloughed full time staff or reduced hours and pay
- There was a decline in volunteers of over **8,000** individuals
- Organizational concerns around cultural **“Brain Drain”**

ArtsFund COVID Cultural Impact Study

Photo Credit: Hilltop Artists, Sam Scalise, Ben Johnsen, and Trenton Quiocho, Live Halloween Blow, photo courtesy of Hilltop Artists.







Photo Credit: Whim W'Him, "Nova" rehearsal, photo courtesy of Stefano Altamura.



# SHIFTS TO VIRTUAL PROGRAMMING

## Shifts in Cultural Consumption

- Prior to March 2020, **76%** of cultural participants reported attending cultural programs monthly or more frequently.
- Since March 2020, only **28%** of cultural participants reported attending cultural programs monthly or more frequently

*It is usually a much larger part of my life. I generally attend 2-3 in person events weekly, but everything has switched to online. It's good to have that option, but the connection is not the same.*

Unknown County Cultural Participant

# SHIFTS TO VIRTUAL PROGRAMMING

## Cultural Participation

- **70%** of statewide organizations reported offering significantly more digital programming.
- **18%** preferred to continue to engage remote-only for the foreseeable future.

*Being able to attend cultural programming virtually was crucial for my sense of well-being and mental health. It enabled me to feel connected to the world — even to broaden my world*

King County Cultural Participant



# SHIFTS TO VIRTUAL PROGRAMMING

## Lens on Accessibility

- Nearly **one-third** made accessibility improvements (e.g. offering ASL interpretation, closed captioning, visual descriptions).
  - Of those organizations, **84%** intend to make those changes permanent.





# FUTURE OUTLOOK & OPPORTUNITIES

## Rethinking the Cultural Organization

Responses to *Since March 2020, what have been the reasons for your participation in cultural programs?* Cultural Participants

To experience art 69%

Makes me happy/brings me joy 67%

To support a community organization or program 64%

To patronize an organization that I have strong connections to 59%

To participate in your local community/makes me feel connected to my community 53%

To escape/relax 50%





# FUTURE OUTLOOK & OPPORTUNITIES

## Role of Arts & Culture

- **48%** of cultural participants value cultural programming more now than prior to March 2020.
- **32%** of the public value cultural programming more now than prior to March 2020.

*I've had to live largely without it for two years and I've missed it profoundly. My mind, my heart, and my community all feel smaller*

King County Cultural Participant

# FUTURE OUTLOOK & OPPORTUNITIES

## Role of Arts & Culture

- Almost **93%** of cultural participants believe that the role arts & culture will play in their communities post-pandemic recovery will be somewhat or very important.

Responses to <i>What role do you think cultural nonprofit organizations should play in communities post-pandemic?</i>	Cultural Participants
Economic recovery for businesses and organizations	40%
Encouraging community unity and vitality	40%
Providing entertainment and escape	37%
Offering inspiration and hope	36%
Creating employment for individuals	32%



# RECOMMENDATIONS

1. Reimagine the role of arts and culture in our communities.
2. Protect the cultural workforce.
3. Center equity.
4. Support the long-term adaptation of the industry.
5. Expand and sustain public support.

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# QUESTIONS?

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