



KEY FINDINGS

Impact Surveys for Arts and Creative Industries, Organizations and Workers

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SURVEY BACKGROUND

When:

October 6 – November 27, 2020
before second stimulus passed,
post CARES Act implementation.

Total Workers Surveyed:

993 individuals
60% earn between 75-100% of
revenue pre-pandemic in the arts,
culture and creative sector.

Total Organizations Surveyed: 607,
83% nonprofit, 10% private sector,
7% sole proprietorships.
20% Black, Indigenous, People of Color
(BIPOC) led with 36% primary mission
to serve the BIPOC community.

KEY TAKEAWAYS

- Federal relief has been a lifeline for the industry and unemployment for the self-employed has been a critical survival tool.
- Until the sector is able to reopen again to full capacity, financial relief to support arts workers particularly Black, Indigenous and People of Color (BIPOC) is essential.
- As arts/creative businesses remain closed, relief funds are critical to survival.
- Nonprofit arts organizations and arts workers are a fragile economic ecosystem and the pandemic has only intensified the fragility.
- Long term systems to reimagine new arts nonprofit business models and to support arts workers who are self-employed need to be examined and implemented.



KEY TAKEAWAYS

- Survey shows that the arts worker, with an emphasis on performing arts, are among our most vulnerable workforce.
- Arts workers are suffering from a combination of fragile economic foundations, devastating and immediate loss of income and a lack of safety net infrastructure.
- Workers are barely hanging on and are contemplating leaving the industry and the state.
- Mental health support was among the top five needs for arts workers.
- With continued closures and without any state guidelines for live performances at any tier, we are facing a California creativity crisis and pending Cultural Depression.



DISPROPORTIONATE IMPACT TO BIPOC WORKERS & ORGS

- 100% of those who identify as Black or African American indicated a loss of income while 12% of all other ethnic groups identified a similar loss.
- Of those who indicated need for rent/ mortgage relief 49% BIPOC vs. 29% who identified as White.
- BIPOC organizations and workers reported disproportionate access to CARES Act funding. Example 18% denied CARES Act funding vs. 5% non BIPOC.
- Private Sector Support for BIPOC organizations higher from private foundations than non BIPOC (59% vs. 53%) but lower for individual donors (60% vs. 67%).



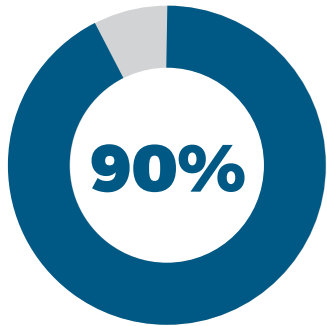
LAYOFFS & CLOSURES

- **72% orgs terminated paid staff and 50% terminated contractors.**
- **51% with salary reductions/terminations unable to determine when they can hire back without more info about when they can reopen to public.**
- **Closed businesses surviving primarily due to the Federal Relief programs such as PPP (79%) and private sector support (63.5%).**
- **16% not confident they will survive if not able to open before 4/1.**

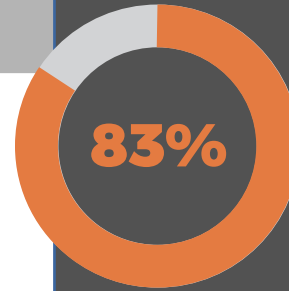
Impact Survey Workers



Before the pandemic, **more than half (60%) of respondents earned between 75% and 100% of their income** in the arts, culture and creative sectors.

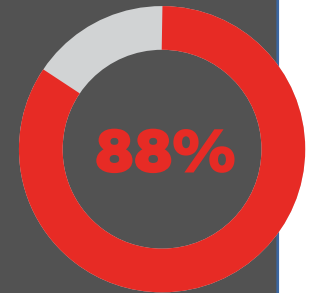


For those who identified as arts educators, **90% have lost income due to the pandemic.**



83% of all survey respondents indicated that **the pandemic had impacted their employment situation.**

88% indicated that they had **lost income or other arts-related revenues** due to the pandemic.



"I lost my apartment and had to move to my parents in Colorado. They are not charging me rent and are buying groceries. Anything else I do I am digging into savings."

"I'm weighing options on moving out of state to lower expenses."

Impact Survey Workers Broader Impacts

The toll the Covid-19 pandemic could take on the sector and by extension the state is not inconsequential:



are "reconsidering the likelihood that they can make a living in their creative practice in the foreseeable future."




would "seriously consider taking a permanent non-arts related job for better compensation and stability."



have "already taken a permanent non-arts related position."

85% of those who earn income in the for-profit creative industry indicated that they had to close their arts-related business due to the pandemic.



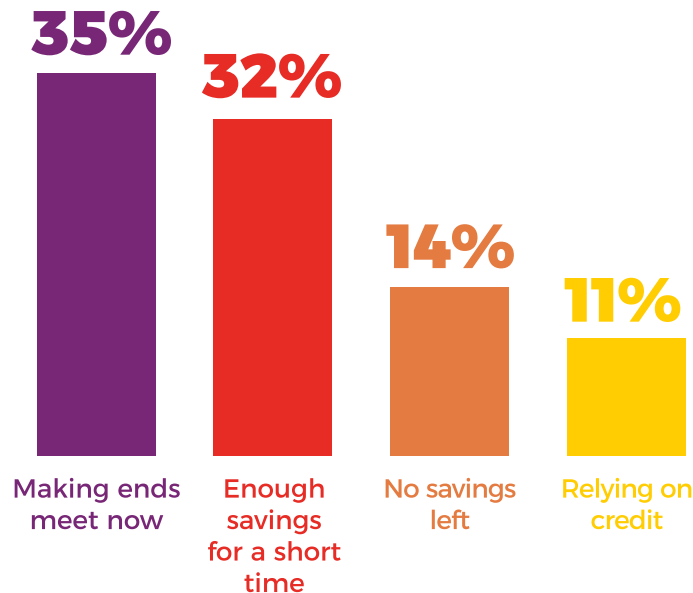

10% have sought or are receiving rent or mortgage forgiveness.

20% of all respondents in either employment category, have considered moving out of state to address the economic hardships of the pandemic.



Impact Survey Workers Financial Reserves

In addition to examining access and reliance on financial assistance, the survey sought information on respondents' financial reserves.



52% of those relying on credit cards or lines of credit also indicated having no savings left.

55% of those who have had to cash in life insurance or dip into retirement savings are also relying on lines of credit.

These respondents will likely exit the pandemic with a high level of debt and significant long-term financial losses.

"I am refinancing my house to get cash out for living expenses."

"I literally have \$127.00 to my name and no income for the foreseeable future."

Impact Survey Workers Needs for Assistance

Survey respondents were given a list of possible support options and asked to identify those that would be of benefit to them now or in the coming year.

#1

Another round of PPP funding or something similar



#2

Extended PUA for self-employed individuals



#3

Access to a program similar to the WPA, Federal Project Number One, or CETA



#4

Residential mortgage or rent relief

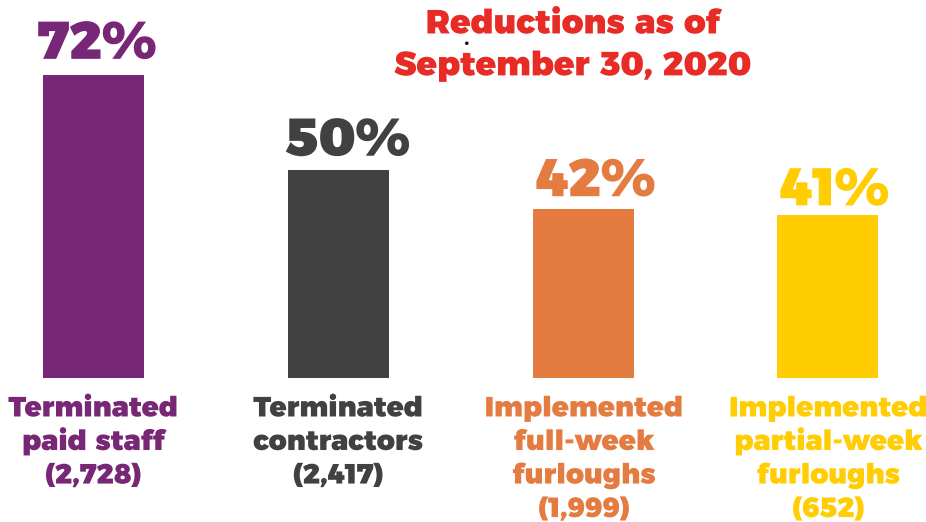


#5

Mental health support



Impact Survey Organizations



76% indicated that their programs in Title 1 schools have been adversely impacted by the pandemic.

60% have furloughed or terminated teaching artists or other education workers.

"We no longer have the funds to reopen in-person except for volunteer-run programs"

"We may not close the business, but we will not be the same organization."

Impact Survey Organizations

The Challenges of Reopening for Performing Arts Venues



70%

**Making patrons
feel safe**



40%

**Facility alterations to
comply with social
distancing requirements**

17% indicated the need to procure face masks and other PPE for patrons, staff, and volunteers.

17% indicated that they would be unable to return to in-person programming until a vaccine is available and/or there is widespread immunity.

Funding to support venue ventilation modifications to allow for adequate air exchange on ALL areas of our theatre."

"We have been told that there is NO road map to live performances during any stage of the Governor's plan."

Impact Survey Organizations Resources Needed to Reopen

66%

Funding to support ongoing reduced operations until we are able to reopen and begin earning revenue again

33%

Bridge loans, grants or subsidies for start-up costs

27%

Assistance with creating a new sustainable business model for the future

25%

A toolkit or other technical assistance to comply with social distancing and reopening guidelines

23%

Rental/Mortgage relief

16%

Advice and assistance with rethinking our organization's mission and vision for the future

Recommendations

- Reopening Guidelines for the Live Events/ Performing Arts industries
- Jobs Creation for arts workers: SUPPORT: CA CREATIVE CORPS Pilot (\$15m) and Legislation SB 628 (Senator Ben Allen)
- Increased long term funding for the arts. SUPPORT: \$1 for the Arts! (Assm. Sharon Quirk Silva budget letter introduced 2/19)
- Funding to Reopen Safely



Recommendations

- Continued Federal & State Stimulus funding
- Infrastructure & employment systems to support living wage and housing/food security and mental health for artists.
- Radically reimagine business models, hiring practices, board recruitment, policies, resources and programs centered in racial and cultural equity
- New program delivery models and technical training & support





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