



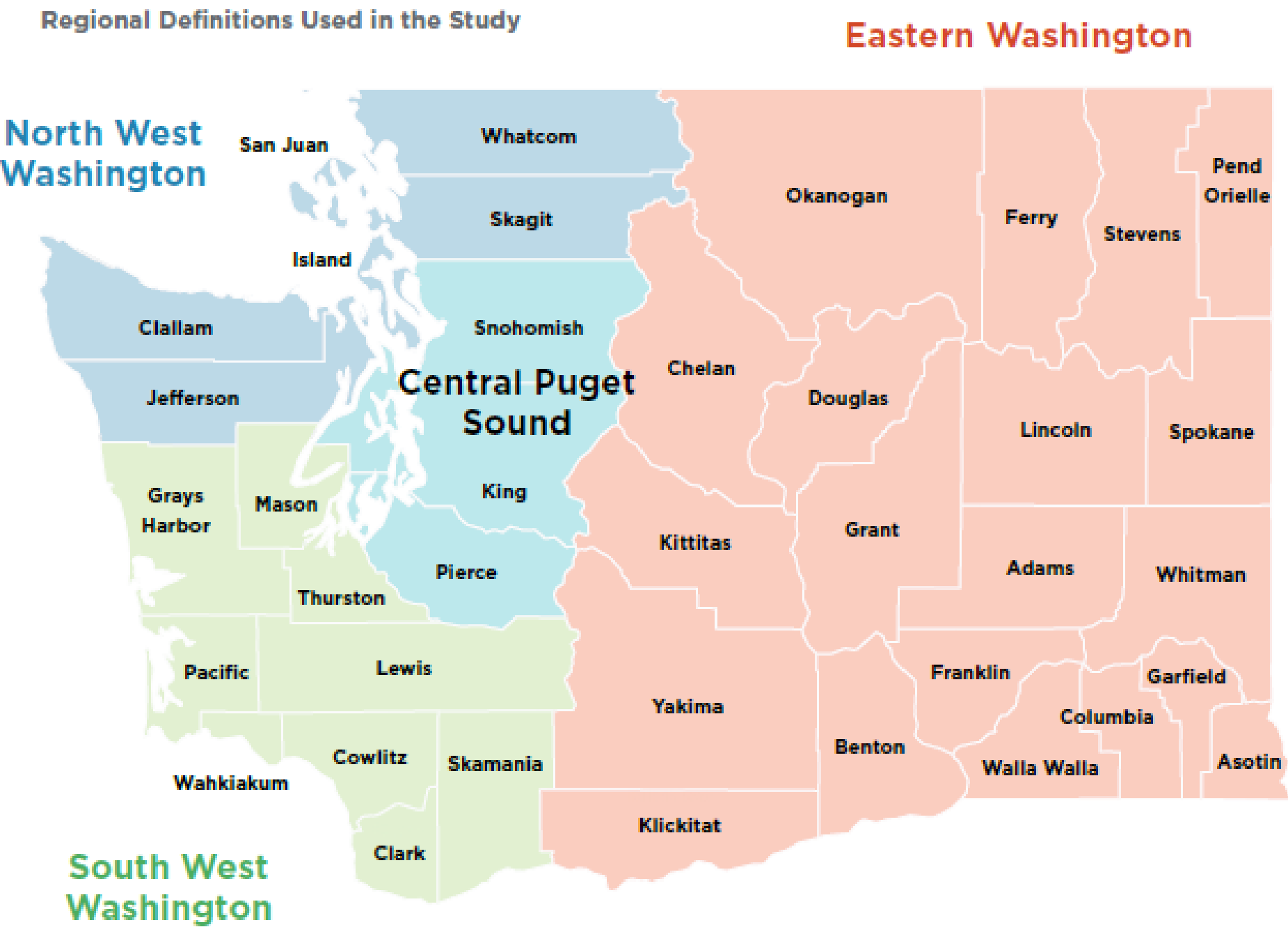
COVID CULTURAL IMPACT STUDY

*Presentation for:
InspireWA
Legislative Session Webinar
February 1, 2022*

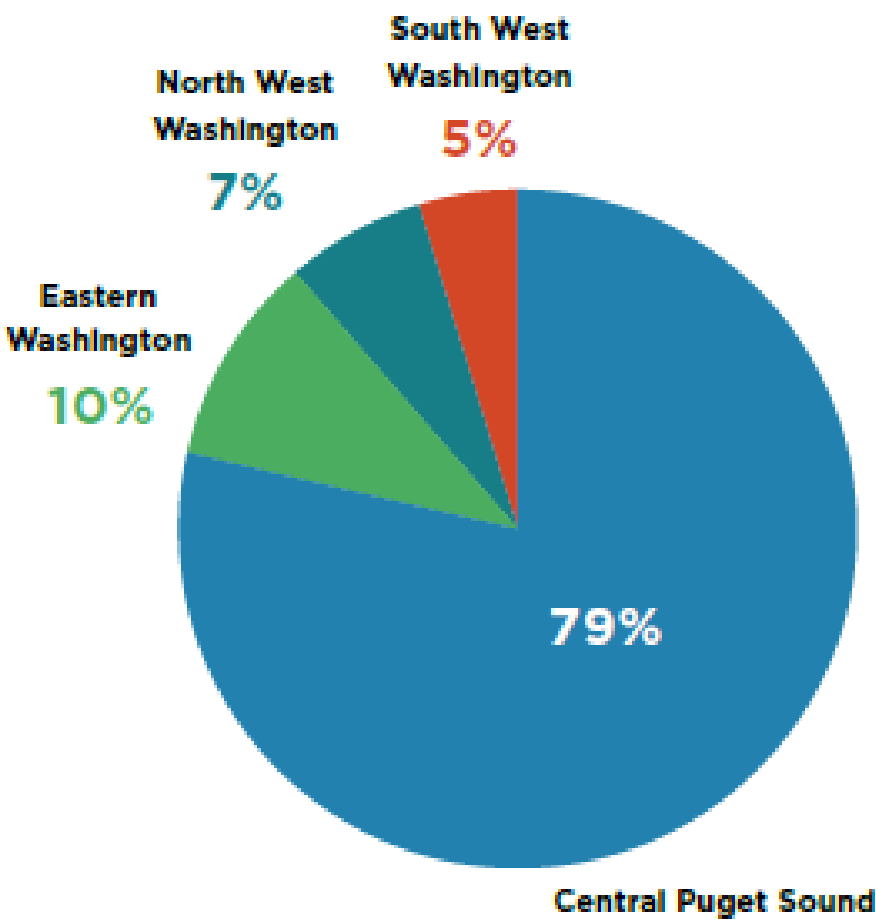
Photo Credit: Youth in Focus, Creative Career Cohort class 2021, photo courtesy of Youth in Focus



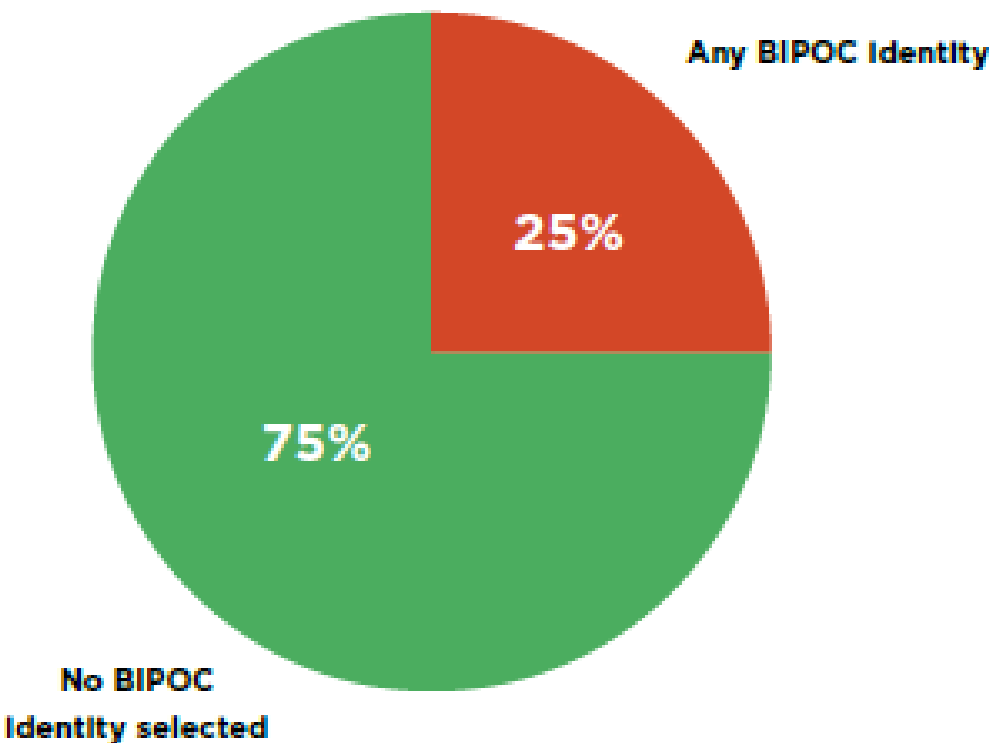
OVERVIEW & METHODOLOGY



Nonprofit Organizational Survey Respondents by Region



Nonprofit Organizational Survey Respondents by BIPOC Identity



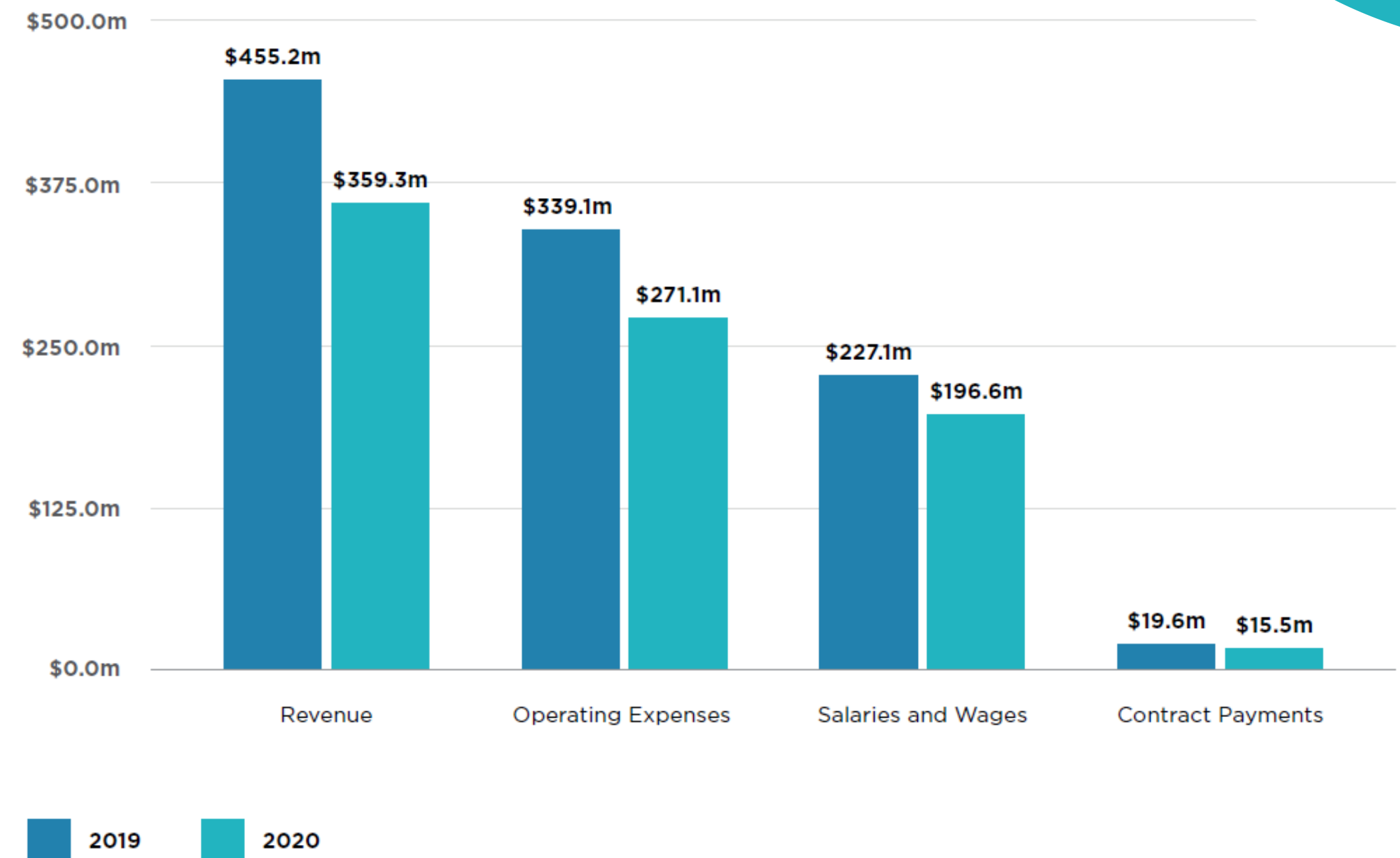
Source: ArtsFund CCIS Nonprofit Organizational Survey, 2021; BERK, 2021.

FINANCIAL IMPACTS

Revenue & Budget Loss

- **\$95.9M loss** in overall revenue between FY2019 and FY2020.
 - **\$131.6M decrease** in earned revenue and **\$35.7 increase** in contributed revenue.
- Cultural participants are expecting to spend about **50% less** of what they spent prior to March 2020 on cultural participation.

Summary of 2019-2020 Changes to Cultural Organization Financials

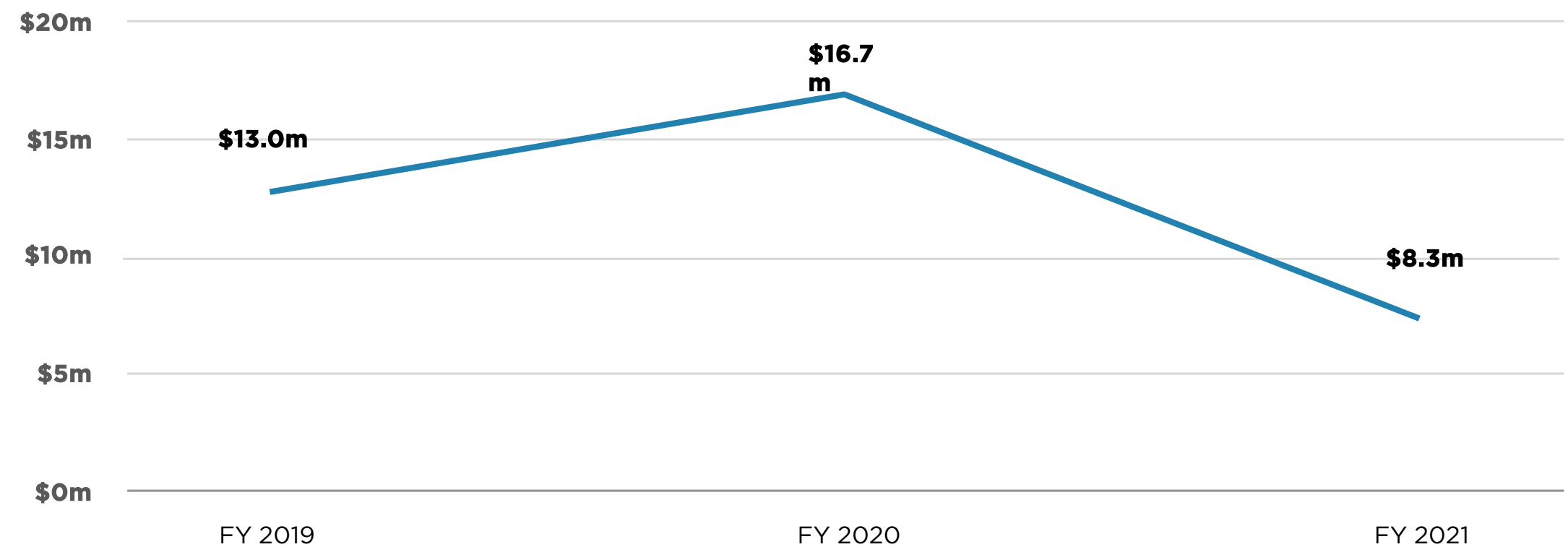


FINANCIAL IMPACTS

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.

Access to Pandemic Relief Funds by Region

	King	Central Puget Sound (including King)	Eastern Washington	North West Washington	South West Washington
Average Number of Sources Accessed	4.23	4.12	3.23	4.44	2.75
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.



SHIFTS TO VIRTUAL PROGRAMMING

Cultural Participation

- 70% of organizations reported offering significantly more digital programming.
- 16% preferred to continue to engage remote-only for the foreseeable future.

When everything seemed to go away in March 2020, life felt so closed off from community and possibility. The way organizations pivoted to virtual events, doing performances in new and previously never attempted ways was magical. I felt the artists' desire to keep making art and connecting with us as something wonderful and personal, and unexpected. It's hard to put into words but it mattered so much to me. I thought live music would have to stop being part of my life for the foreseeable future, but the artists and arts organizations found a way.

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

- Reasons for participation since March 2020:
 - To experience art
 - Makes me happy/brings me joy
 - To support a community organization or program
- **42%** of organizations reported increases in activities with local partnerships.



FUTURE OUTLOOK & OPPORTUNITIES

Role of Arts & Culture

- Economic recovery for businesses and organizations
- Creating employment for individuals
- Encouraging community unity and vitality
- Supporting mental wellness among youth & adults
- **87%** of statewide poll respondents say they value cultural programming more or the same amount as pre-pandemic.

I have always felt that arts and culture are some of the most important things in our society, and after seeing how they were cast aside in the pandemic I am even more passionate about advocating for proper funding and attention being paid to them.

Snohomish County
Cultural Participant

RECOMMENDATIONS

1. Reimagine the role of arts and culture in our communities.

- Center the cultural sector in economic development strategies, generate new audience research.

2. Expand and sustain public support.

- Advocate for legislations that provides sustainable funding for the cultural sector and directly invest in arts as a strategy for social impact.

3. Protect the cultural workforce.

- Pilot models to increase cultural worker wages and wage stability, expand employment definitions and eligibility criteria, and invest in services to make arts occupations more viable.

4. Center equity in everything we do.

- Actively eliminate funding barriers and help diminish the digital divide.

5. Support the long-term adaptation of the industry.

- Provide unrestricted, multi-year support, further access to technology, support public health initiatives, and participate and give!

ARTSFUND 

THANK YOU

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QUESTIONS?

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