



Artist and Arts Groups COVID-19 Impact Survey

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An asterisk * in the survey summary indicates that further detail is provided in the appendix.

ACKNOWLEDGEMENTS

CAST referenced survey questionnaire structure and reporting format from: Americans for the Arts, City of Oakland, and California Arts Council.

CAST created the COVID-19 Impact Survey to inform its work, using the tools and support available at the outset of the pandemic. The creators of the survey and summary are not trained data collectors, but worked collaboratively with the entire CAST team to ensure the analysis was accurate and clear.

Thank you to the individuals, organizations, and institutions for survey distribution support, including Arts Education Alliance of the Bay Area, Center for Cultural Innovation, City of Oakland, Grants for the Arts, Kenneth Rainin Foundation, San Francisco Arts Commission, The QTBIPOC Performing Artist Hive, The San Francisco Foundation, The Walter & Elise Haas Fund, and Yerba Buena Alliance.

ATTRIBUTION

If you intend to use any of the data or findings from the CAST COVID-19 impact survey, we ask that you please attribute the content to CAST either by citing CAST or including CAST's logo (link to logo: bit.ly/cast_logo):

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Special thanks to Raine Robichaud for designing the survey and analyzing the results.

SUMMARY

On April 10th, the Community Arts Stabilization Trust released the COVID-19 Impact Survey to measure both the immediate economic and physical space impacts of the pandemic on the Bay Area arts and culture sector. The survey was distributed to local Bay Area artists and arts groups through multiple stakeholder communication vehicles and CAST's social media channels and mailing list. CAST received responses from 91 organizations and 38 individual artists representing over 15 Bay Area cities across all seven Bay Area counties. The most represented cities in the survey were San Francisco and Oakland, CAST's geographic priority areas. Due to the small sample size in individual artist responses, the data presented in pages 2-9 is from the arts organization responses, and a separate summary of the individual artist responses is located at the end of the report.

Staff reviewed national, state, and local surveys to inform the design of the 6-minute, 22-question survey, which included both multiple-choice and optional open-ended questions. Responses represented estimated impacts from April 10 - May 18. The data will help inform CAST's real estate strategies for a physically-distanced way-of-life on current projects, projects in the pipeline, and new opportunities.

KEY FINDINGS

Nearly all small to large budget organizations and individual artists reported significant revenue loss between March 16 and May 18.

Both organizations and individual artists are at risk of displacement (losing their commercial or residential spaces) over the next 1-6 months starting from May 18.

Organizations that serve the African American and Latinx communities are the most financially impacted by the pandemic and at risk of displacement.

42% of organizations that offer online programs report concern about technology capacity for their online programming.

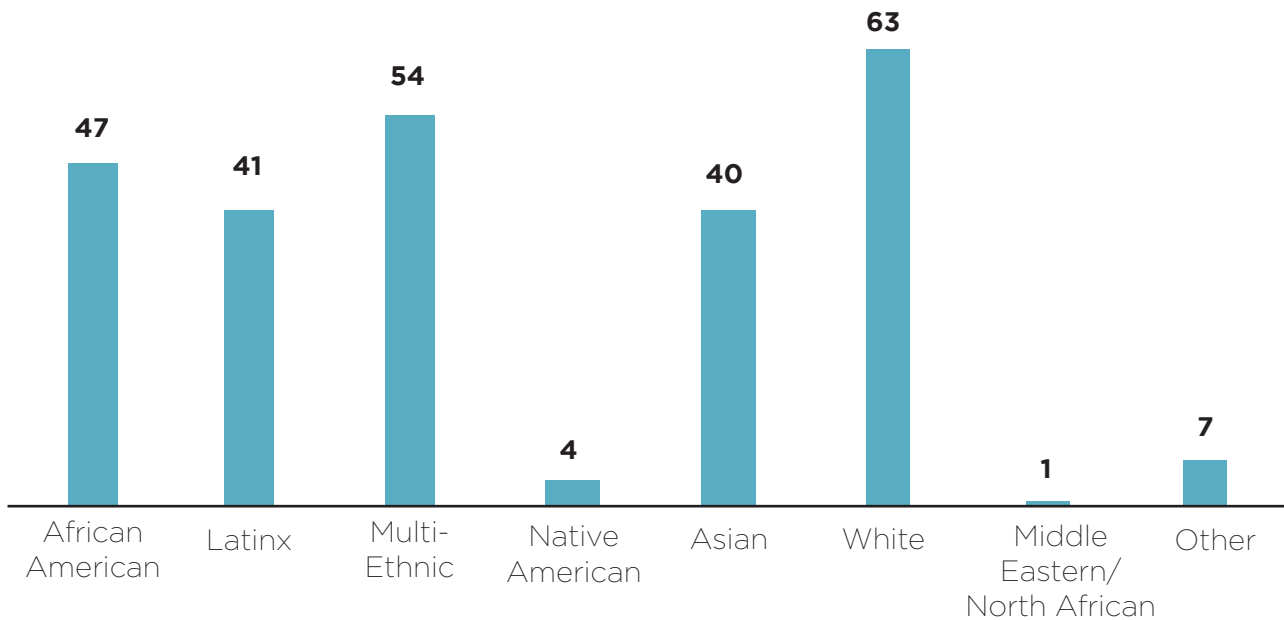
In spite of the pandemic, arts organizations, artists, and arts workers continue to play a vital role in supporting their communities and neighborhoods and providing essential services.

DEMOGRAPHICS*

CAST received survey responses from 91 organizations

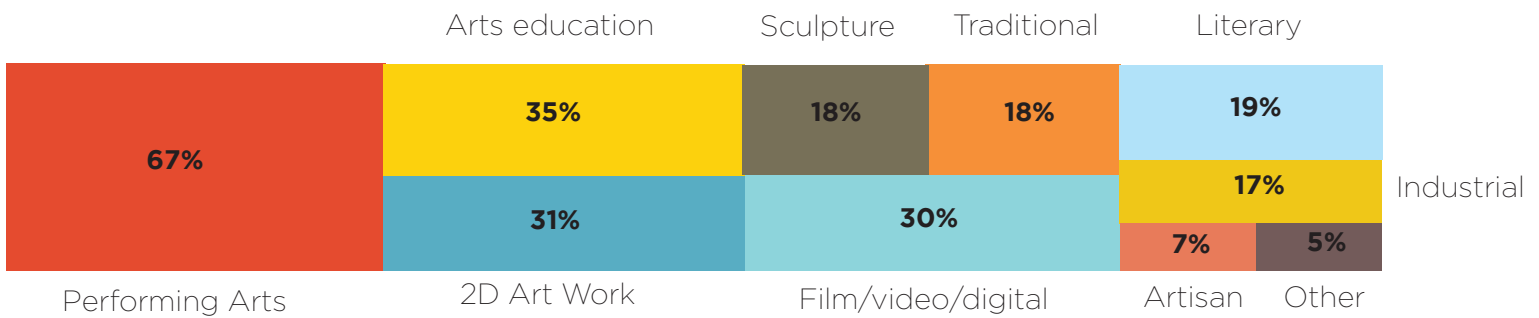
Ethnic groups served by organizations:

Organizations were asked to select the three ethnic groups they most frequently serve



Artistic medium practiced by organizations:

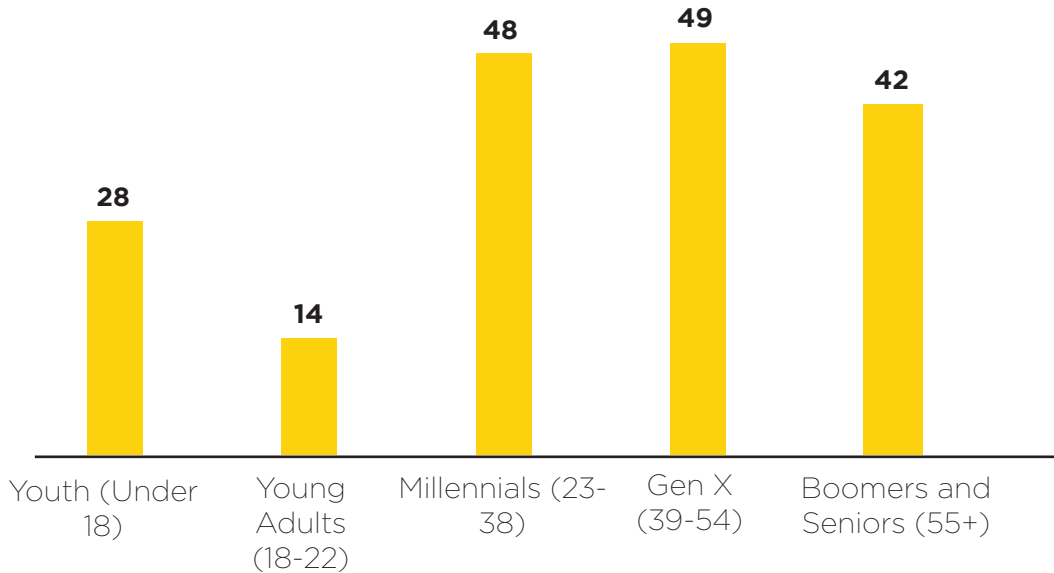
Organizations were asked to select all artistic media practiced



DEMOGRAPHICS

Age groups served by organizations:

Organizations were asked to select the three age groups they most frequently serve



FINANCIAL IMPACT

Between March 16 and May 18:

- Organizations surveyed collectively lost **\$11 - \$15 million*** with annual operating budgets ranging from **\$30,000 - \$5.8 million.***
- Organizations who experienced revenue loss reported an average of **21%** of annual operating budget lost.*
- Organization revenue loss as percentage of operating budget ranged from **0% - 77%.***
- 706** full, part-time, and contractor employees laid off – two (large budget) organizations accounted for 65% of this total.

PANDEMIC ACTIONS

CAST's survey asked organizations to select from a list of common actions taken in response to COVID-19 and provided an open-ended prompt for organizations to describe the resources that would be most helpful to help them during the pandemic.

Most common resources pursued:

- Applied for emergency grants (87% reported)
- Attended workshops on COVID-19 resources (66% reported)
- Initiated fundraising efforts related to COVID-19 (65% reported)

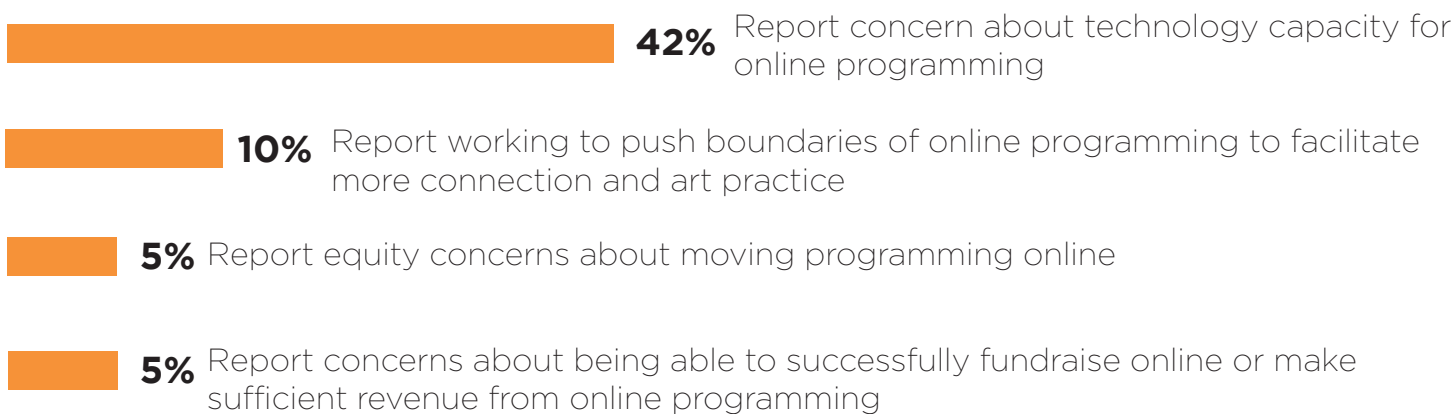
Most common resources requested:

- Financial resources, especially unrestricted funds
- Unified platform for resources, networking, and marketing
- Safety guidelines for planning future programming

Shifting Online

74% of organizations reported increasing their online presence since the pandemic began, with 46% offering programming online. Survey responses indicated that additional resources are required to increase organizational capacity for online programming as well as to assist with the revenue gap organizations do not expect online programming to fill.

Of organizations that offer online programming:

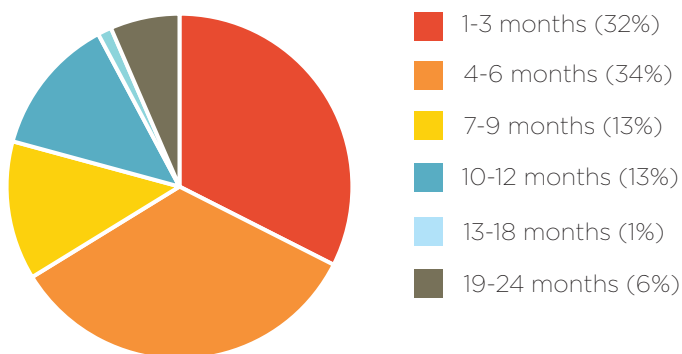


“Everything is online, so [we’re] evaluating technology needs and how we will provide access to underserved immigrant communities.”

REAL ESTATE + SPACE

Organizations: Ability to Pay Rent/Mortgage over Time (as of April 10 - May 18)*

Nearly all organizations surveyed face risks of displacement barring additional emergency funding or moratoriums. Of the organizations surveyed, 81% rent, 10% own their space, and 2% both rent and own. 7% of surveyed organizations do not rent or own physical space. Concerns of not being able to make facility payments were expressed across the board for both those renting and owning.



Prior to the pandemic, existing market pressures had already placed the arts sector at-risk of immediate displacement. The survey indicated that the need for funding and real estate assistance has grown even more urgent to prevent widespread displacement.

“...cultural space preservation...has only grown exponentially as a result of the crisis so it hasn't morphed so much as amplified.”

65%

65% of organizations who rent or own space reported only being able to afford space for another 1-6 months barring emergency relief or moratoriums

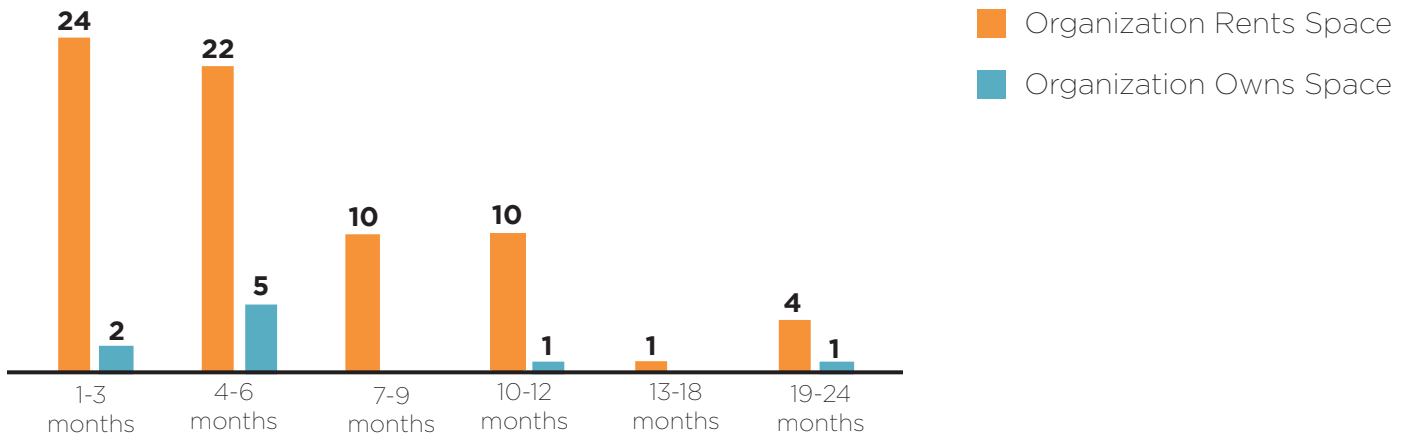
42%

42% of organizations with space reported having to close their building due to shelter-in-place orders

“Will Theatre return as we know it? Will people feel safe to gather to see others perform? Will we need physical venues in the future given the risk of infection if they are used? Will the craft of acting ever be taught in groups in person?”

REAL ESTATE + SPACE

Organizations: Ability to Pay Rent/Mortgage over Time (as of April 10 - May 18)*



This chart illustrates that the impact of the pandemic has been so dramatic that even organizations who have secured stable, owned space are in need of support.

Space-related themes and concerns from open-ended questions*:

AFFORDABILITY*

- Rent forgiveness/mortgage relief*
- Funds for space preservation
- Artist housing
- Cash to buy
- Facility-based business models/ loss of rental revenue

OPPORTUNITIES

- Facility improvements
- Reimagining space

SUPPORT + NETWORKS

- Renegotiating lease terms
- Community talks & resources
- Real estate projects in progress
- Space advocacy

PANDEMIC ADJUSTMENTS

- Safety in reopening spaces
- Outdoor venue accessibility
- Public readiness for gathering
- Physical space viability

REIMAGINING SPACE + FUTURE

Arts groups indicated how they were navigating the challenges and uncertainty of the pandemic, while explaining what they hoped for the future, and ways to reimagine or reconfigure arts spaces both within and after the pandemic. What follows is a summary of the most common themes derived from the open-ended questions on how the pandemic has provoked organizations to reevaluate their businesses, longer-term strategies, and overall needs.

■ ADAPTABILITY

Organizations reported that they were working to alter elements of their space temporarily — such as using storage space as studio space, workspace as media recording space, as well as audience spaces — to accommodate social distancing and allow artists to continue working during the pandemic.

■ PARTNERSHIPS + NEW MODELS

Several organizations noted that they may need to partner with other groups in order to share rental costs. However, one organization noted that partnerships do require increased operational capacity and that the financial stress resulting from the pandemic may not allow them to pursue beneficial partnerships.

■ TECHNOLOGY CAPACITY

As part of shifting to online content and programming, organizations are wondering how their space may need to change to accommodate recording equipment and support the filming of performances and classes.

■ MONETIZING SPACE

As many art spaces have closed to the public as part of shelter-in-place orders, organizations are wondering how to use existing equipment and space capacity to generate income for artists. Shifting to PPE fabrication is one strategy. Organizations also wonder how to generate revenue from online events, as the quality of the experience is often compromised.

Long-term strategy themes:

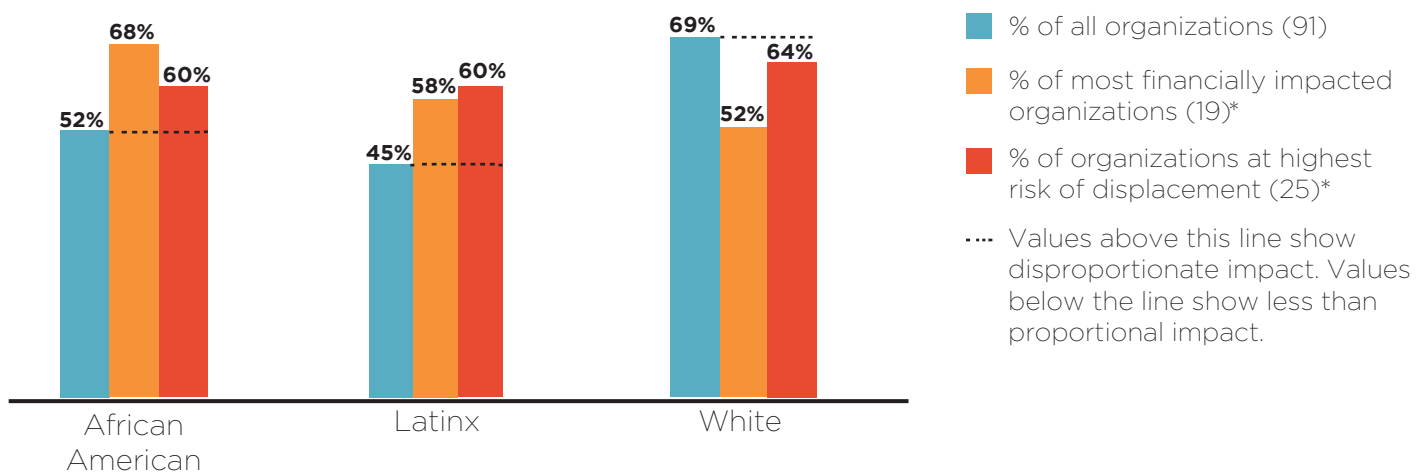
- Equity
- Online programming as core program tool
- Evaluating current/future space needs
- Staff reduction & retention
- Fundraising
- Technical and community support

INEQUITABLE IMPACT

All 91 organizations reported revenue loss or anticipated revenue loss. 20% of organizations reported a loss of 33% or more of their annual operating budget. The survey results indicated that organizations serving the African American and Latinx communities were disproportionately impacted financially and at risk of displacement, while organizations serving white audiences are disproportionately less impacted in both of these areas. Additionally, organizations that serve Youth (17 and under) and Young Adults (18-22) are disproportionately financially affected.

Impact on organizations by primary ethnic groups served:

Organizations were asked to select the three ethnic groups they most frequently serve, so may appear in more than one of the categories below



“ Distributed leadership and cultural equity are now more urgent than ever.”

Statewide surveys reported that the financial and health impact of COVID-19 has disproportionately affected African American and Latinx communities, and the CAST survey data shows that this extends to the arts sector as well. The inequitable impact of the pandemic is the result of racial disparities in income, health, and other discriminatory systems.

“ We are already undercapitalized because we serve LBTQIA+ Black, Indigenous, and People of color (Asian, Latinx, SWANA/AMEMSA, etc.). So in the economic down[turn] we need greater investment in our organization.”

The CAST survey results must be understood within this same context: the inequitable impact of COVID-19 in the arts results from long-standing racial inequity within the arts sector. Gentrification and displacement pressures in the Bay Area existed as a threat of displacement prior to the pandemic, especially for organizations serving Black, Indigenous, and other communities of color. This data, beyond indicating areas of need during COVID-19, points to the structures in place within the arts that perpetuate racial injustice.

INEQUITABLE IMPACT

Resiliency

“We are focused on how arts will be an economic engine for our community. As we are [a] community based arts nonprofit, we will work collaboratively with community partners across sectors.”

The impact of COVID-19 extends far beyond the arts field and affects the health and livelihood of communities. As the aforementioned examples illustrate, the aid that artists and arts groups are able to provide goes far beyond arts programming; arts groups and spaces provide (and have historically been the community resource centers for) key health services, safe spaces, emotional support, and connection for their communities.

In spite of the extremely challenging circumstances, arts organizations, artists, and arts workers play a vital role in supporting the community during the crisis. Resilient and creative responses include:

- Art kit distribution
- Supporting essential food distribution
- Training staff to connect community to emergency resources
- Free online programming
- Wellness programming
- Production of PPE

“We believe creating a new more resilient nonprofit theater business model is directly linked to building a more robust and interconnected network of theater artists, technicians, audiences, and communities.”

Because of the key role the arts play as community rapid response centers for their communities and neighborhoods, the survey indicates that there is an opportunity to incorporate the arts sector into municipal and regional recovery efforts, especially in the most impacted communities.

INDIVIDUAL ARTISTS

CAST surveyed 38 individual artists

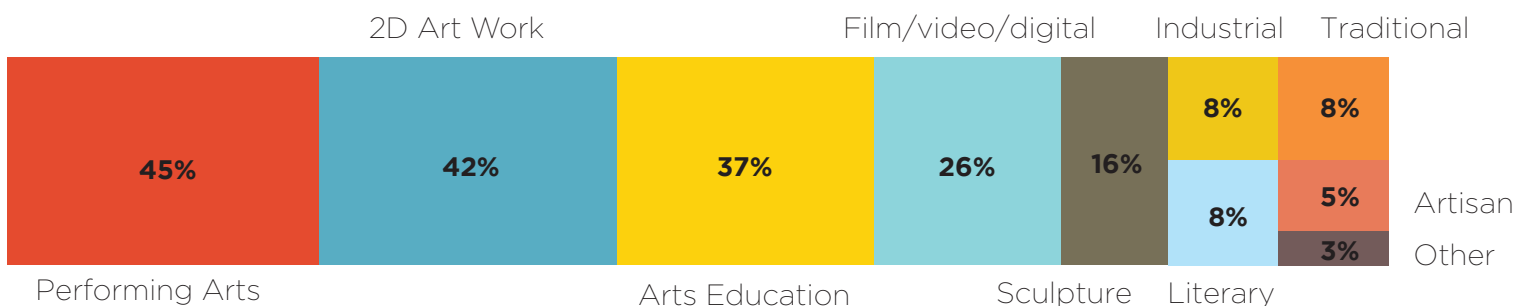
- **68%** of Individual Artists are at risk of displacement from their residences in the next 1-6 months
- Individual Artists who reported income loss reported an average **loss of \$7,657** – an **average of 2.5 months** income.
- **32%** of Individual Artists surveyed reported no access to health insurance, sick leave, or other forms of emergency insurance.

28 out of 38 artists (74%) of respondents reported loss of income due to COVID-19, with an additional 9 artists (24%) reporting that although they had not experienced loss of income at the time of taking the survey, they expected to suffer a financial loss.

32% of artists surveyed reported no access to health insurance, sick leave, or other forms of emergency insurance. Artists who responded to our survey expressed the need for emergency funds, fear of possible displacement, and the difficulties of working on their art form in their home space.

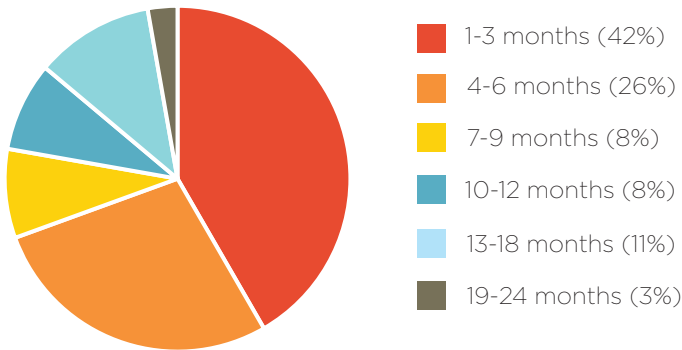
“ [The pandemic is] making me think of giving up art because I cannot survive long relying on art sales income under the current circumstances.”

Artistic medium practiced by artists:

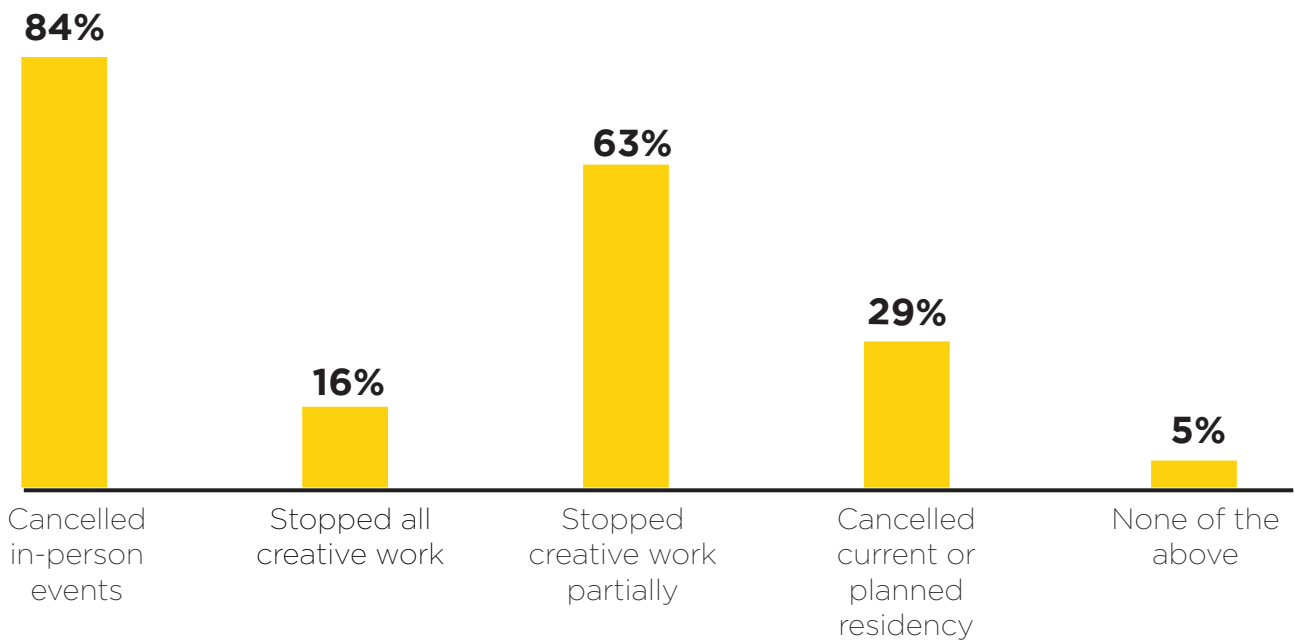


INDIVIDUAL ARTISTS

Individual Artists: Ability to Pay Residential Rent/Mortgage over Time (as of April 10 - May 18)*



Actions taken in response to COVID-19:



“Most likely I will have to give up my creative workspace.”

Space-related themes and concerns from open-ended questions:

- Rent relief and forgiveness
- Reimagining the value of space
- Secure, safe, permanent space
- Cooperative space

APPENDIX

Bar Charts

The labeling and order of the bar charts reflects the language and order of multiple choice questions in the survey, with a few categories consolidated for clarity.

Financial Impact

Organizations were asked to approximate revenue loss since March 16 through the date they responded to the survey: “What is your organization’s estimated loss of revenue since March 16, 2020?” \$11 million, the bottom of the \$11-15 million organizational revenue loss range, represents the lost revenue organizations approximated at the time of completing the survey. \$15 million, the top of the range, was generated by standardizing the losses reported by organizations for the 63-day, March 16 - May 18, period. Organization operating budgets ranged from \$30,000 - \$5.8 million. One organization’s operating budget was far larger than the others, so it was considered an outlier and not included in dollar amount sums, but was included in all other graphs and analysis, including revenue loss as a percentage of annual operating budget. Organizations that did not respond with numerical operating budgets were not included in any financial impact calculations. Revenue loss as a percentage of the operating budget ranged from 0-77%.

The average percent of organizational operating budget loss and average artist monthly income loss were calculated based on the estimated rate of income loss for the total March 16 - May 18 time period. Based on the numbers reported in the survey only (not adjusting for response date), organizations who reported revenue loss experienced a 14% organizational revenue loss as percentage of operating budget and individual artists who reported income loss reported a loss of \$5,293 or 1.7 times their monthly income on average since March 16. In the Individual Artists results, one outlier was removed from income loss as percentage of monthly income calculations.

This survey defines “displacement” as the loss of current physical space. Displacement may result in a move to a different location, or other impacts extending beyond space: it may cause an organization to cease to exist, or an individual artist to stop their creative practice. While this survey did not ask about particular pressures around physical space, the pressures of the Bay Area real estate market existed prior to COVID-19 as a driver of displacement and financial stress for arts groups and artists.

APPENDIX

Real Estate + Space

Organizations that were split between renting and owning multiple spaces were not included in the pie chart (page 5). In the bar chart (page 6), they were counted twice (ie, in both rent and own buckets). 14 organizations did not respond to this section or responded with a non-numerical value, some of whom do not rent or own physical space. These responses were not included in the calculations or the charts.

Organizations were asked to select a time range that their space would remain affordable:

“Given your organization’s/group’s/collective’s/cooperative’s current financial status, and without emergency grants, loans, moratoriums or forgiveness, how long do you think you can continue to pay rent/mortgage?”

Key space related themes were pulled from open-ended questions which asked:

- How has COVID-19 caused you to reevaluate your program, administrative, and/or creative work SPACE needs?
- How are you thinking about longer term strategies to meet your mission and goals? (Optional)
- What would be most supportive for you/your organization? (Optional)

While many themes and topics emerged from these questions, the need for immediate funding was by far the most prevalent and emphasized among organizations, as well as Individual Artists.

Inequitable Impact

Organizations considered to be the most financially impacted, 19 of 91 survey respondents, were those that reported a loss of greater than 33% of their annual operating budget, standardized given different survey response dates.

Organizations considered to be at highest risk of displacement, 25 of 91 survey respondents, were those that reported the ability to pay only for the next 1-3 months rent barring emergency relief or moratoriums. Another 26 respondents reported the ability to pay only for the next 4-6 months, so a total of 52 of 91 respondents (57%) or 65% of organizations who reported renting or owning physical space, reported risk of displacement within 1-6 months of May 18.