

FALL SNAPSHOT:

COVID-19 Impacts on Arts, Cultural, and Scientific Nonprofit Organizations in the Central Puget Sound Region

OVERVIEW

As a part of an ongoing goal to measure the continued impacts of the Coronavirus Pandemic on the arts, cultural, and scientific nonprofit organizations that serve the Central Puget Sound Region, ArtsFund released a snapshot survey, open on October 1, 2020 through October 16, 2020. A total of 47 groups representing the Central Puget Sound Region including King, Pierce, and Snohomish Counties responded. The survey looked at three specific areas impacting organizations including the employment impacts, digital programming, and reopening.

**All quotes were collected in survey*

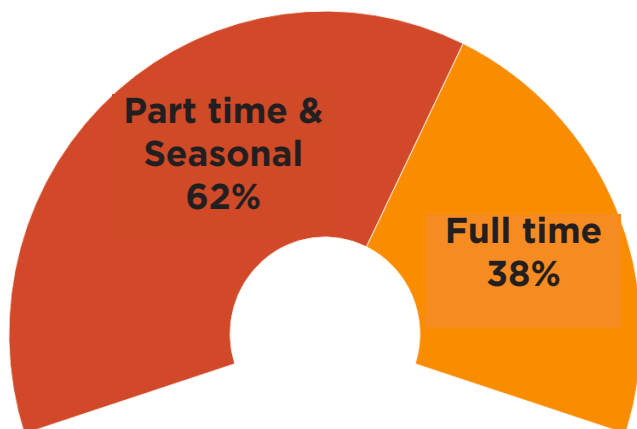
EMPLOYMENT IMPACTS

73% of respondents currently have employees laid off or furloughed as a result of the pandemic.

The average of furloughs and layoffs at responding organizations is 34%, however, the data varies widely between organizations, with 45% of organizations reporting 70% or more of their workforce is affected in at least one category (full time, part time, or seasonal/temporary).

Of those individuals affected by layoffs and furloughs, 38% are full time employees, 62% are seasonal and part time employees.

Percentage of current staff furloughed or laid off by category



"The future of live theater and live music is at risk. Many venues will not survive. Employees, artists, promoter, technicians, stagehands are all unemployed and struggling."

Approximately 9% of the respondent's workforce that had been furloughed and/or laid off as a result of the pandemic have been rehired.

DIGITAL PROGRAMMING

Among respondents, **100% are currently offering digital programming** or are planning to do so with their upcoming programming cycles.

Since the pandemic's start, **91% of those organizations have developed new programs** and **46% have formed new partnerships**.

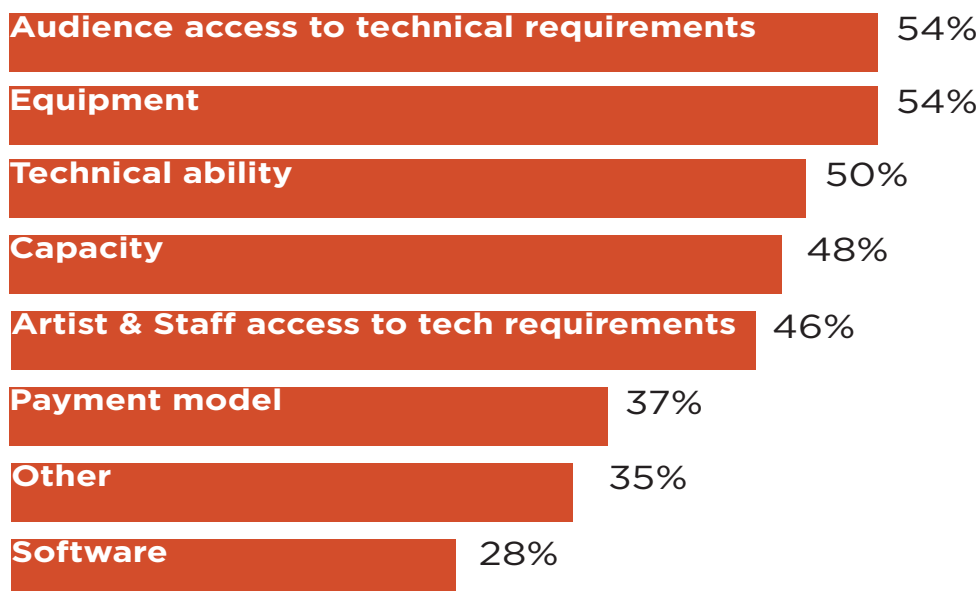
With the new shift to digital, **52% of organizations are not charging for their digital programs**. For the 48% of organizations who are charging, **the cost to patrons to attend digital programs is, on average, 41% less** than attending in-person programs.

"Our digital offerings are providing some revenue, but they are not a sufficient replacement.."

Creating, editing, and presenting this content is a time intensive undertaking. With many respondents working with, on average **34% fewer employees** due to furloughs and lay-offs, organizations are dealing with staff fatigue and the resulting limited capacity.

"...We have had to re-invent all our systems and processes at a time when staff feel overwhelmed and burdened by coping with the coronavirus in their personal lives."

What has been the largest challenge around shifting to digital programming?

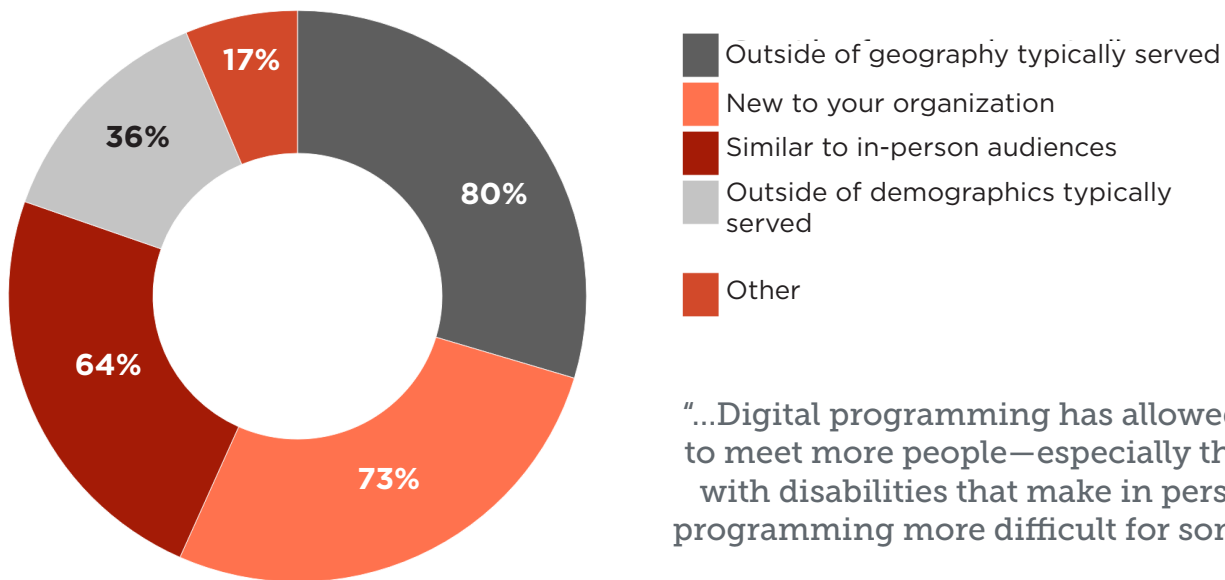


Making digital programming available is not without challenges, including **the audience's access to technical requirements, equipment, capacity, and technical ability**. Among the "Other" category, groups cite screen fatigue, limits on gatherings to create content, cost, and content creation.

DIGITAL PROGRAMMING

A positive outcome from making the shift to digital is that **respondents are connecting with broader audiences.**

What are some of the characteristics of online audiences you are reaching?



"...Digital programming has allowed us to meet more people—especially those with disabilities that make in person programming more difficult for some..."

REOPENING

At the time the survey was deployed, **63% of responding organizations were unable to open due to public health guidelines.** Among those that could reopen were museums, cultural and heritage organizations, and zoos.

72% of organizations permitted to reopen under limited capacity guidelines did so. The 28% of organizations who received the green-light to reopen have yet to reopen and are planning projected reopening dates between **January 2021 through the Summer of 2021,** with worst case scenario projections going into **2022.**

For groups who have reopened to limited capacity, audiences have returned with enthusiasm and have expressed excitement to return to "the sense of belonging and community" they feel at arts and cultural organizations.

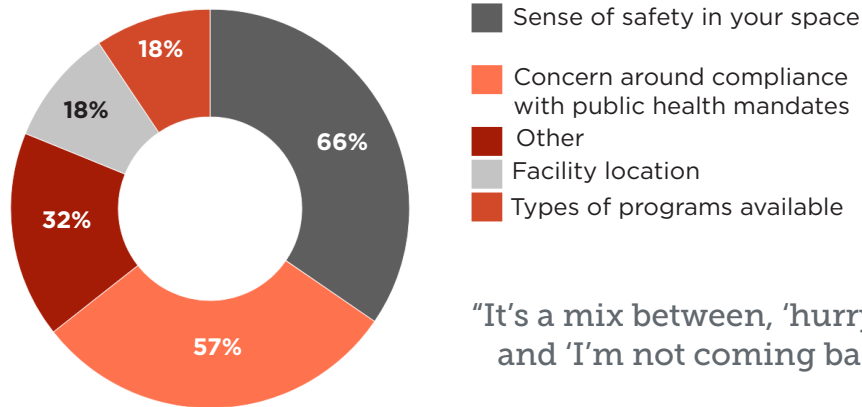
"[The response to our reopening has] been very positive with comments about our adherence to safety protocols and appreciation that we are still standing!"

While not all organizations are able to reopen, many are working to understand what their patrons are looking for when the time for reopening comes. While patrons miss attending arts events and are eager to get back to the arts, **many are concerned about social distancing,** while others are hesitant to return until there is a vaccine.



REOPENING

What have been your patrons' concerns about returning to your organization?



"It's a mix between, 'hurry up and bring back the arts!' and 'I'm not coming back until there is a vaccine.'"

LONG TERM IMPLICATIONS

Loss of Critical Workforce

We are beginning to see organizations hiring staff back. While the numbers still do not account for all of the unemployment spurred by the pandemic, approximately 9% of the respondent's workforce has been rehired at the time of the survey. This is a small percentage of the total employment impacts to the arts and cultural sector. Many seasoned professionals are facing part-time work, furloughs, or no work at all. With this sharp decline to wages, many staff are seeking positions that pay full-time wages. This is cause for concern around **the detrimental loss of highly skilled professional creative workers who are essential to the creation of our region's vibrant and high caliber arts and cultural landscape.**

"We also remained concerned about the risk of losing theater professionals in Seattle and beyond given little or no work available during COVID"

Hybrid Presenting Model

Many organizations have made the pivot to digital programming amidst the numerous challenges and **organizations are seeking to maintain digital programs beyond the closures and adopt hybrid models moving into the future.** While these methods of delivery are reaching new audiences and better serving patrons with disabilities, engagement through digital delivery methods requires more time, capacity, and equipment to make it meaningful.

"...It is exciting that you can reach across time zones to engage with a whole different patron."

WHAT YOU CAN DO

- Prior to the closures, organizations have relied on a balance of earned and contributed income to continue operations. In the wake of ongoing closures and limited capacity re-openings, resulting in drastic reductions to their earned income streams, **arts and cultural nonprofits need support.** Buy tickets to events, purchase a membership and season passes, and contribute.
- Join us in **spreading the word that arts are essential to our communities.** As key actors in our communities, stewards of arts and culture, and major economic and social drivers, they need your voice to amplify their critical work.

For more information, please visit <https://www.artsfund.org/covid-19-arts-sector-impacts/> or contact Sarah Sidman, Vice President of Strategic Initiatives and Communications at sarahsidman@artsfund.org