



# COVID CULTURAL IMPACT STUDY

*Charting the state  
of Washington's  
cultural nonprofits*

ARTSFUND





1. Letter from ArtsFund	02	• <i>Seattle Art Museum</i>	72
2. Executive Summary	05	• <i>Spark Central</i>	75
3. Introduction	14	• <i>Tasveer</i>	78
4. Findings	18	• <i>TeenTix</i>	81
• <i>Scope &amp; Definitions</i>	19	6. Future Outlook and Opportunities	83
• <i>Financial Impacts</i>	25	• <i>Future Outlook</i>	84
• <i>Cultural Participation</i>	29	• <i>Statewide Public Opinion</i>	88
• <i>Access to Pandemic Relief</i>	33	• <i>Rethinking the Cultural Organization</i>	90
• <i>Financial Survival Strategies</i>	38	• <i>Role of Arts and Culture</i>	95
• <i>Cultural Workforce Impacts</i>	40	• <i>For Future Exploration and Research</i>	99
• <i>Shifts to Virtual and Digital Operations and Programming</i>	45	7. Recommendations	100
• <i>New Lens on Accessibility</i>	51	8. Appendix	104
• <i>Centering the Experiences of Black, Indigenous, and other People of Color</i>	53	• <i>Participating Groups by Region</i>	105
• <i>Reopening and Return to In-Person</i>	57	• <i>Acknowledgements</i>	108
5. Case Studies	67	• <i>Photo Credits</i>	110
• <i>LANGSTON</i>	69	• <i>Exhibit Titles</i>	112



GMA  
RESEARCH



DAPPER



PAUL G. ALLEN  
FAMILY FOUNDATION

NESHOLM FAMILY  
FOUNDATION



## LETTER FROM ARTSFUND

Upon the arrival of COVID in Washington State in March 2020, arts and cultural venues were among the first to close, and in many cases, remain among the last to re-open. Despite this, the industry has been actively supporting our communities by offering healthy outlets to process the trauma, isolation, and loss that so many of us experienced throughout the crisis. While the cultural sector has shown resilience, innovation, and dedication in finding new ways to serve communities across the state, and while the investment of public, private, and individual supporters has kept the sector from collapse during closure, the future is still uncertain. We are in a moment of crisis. At the same time, we are in a moment of opportunity. The cultural sector will play a critical role in community recovery (economic and social), and there is a role for all of us to play in supporting the sector.

For over 50 years, ArtsFund has been a leader advancing the arts ecosystem in the Central Puget Sound. Building out of more than 20 years of producing Economic Impact of the Arts Studies (1991-2015), and a first-in-kind Social Impact of the Arts Study (2018), we approached this COVID Cultural Impact Study with a strong research foundation. Under the leadership of cross-sector and statewide advisors, and with the collaboration of expert research partners, this project evolved alongside the pandemic. As cultural organizations and community members “pivoted” plans and protocols again and again, so too, did we. In the early months, ArtsFund conducted quarterly impact snapshots on the impacts of the closures to cultural nonprofits within the Central Puget Sound region. As the pandemic’s effects and timeline expanded beyond any foreseeable expectation, so too did the scope of the analysis. With the pandemic’s impact not respecting borders, we expanded our focus to the entire state. The Delta variant delayed anticipated re-openings, and as we head towards the release of this report, the

threat of future variants remains in the public consciousness.

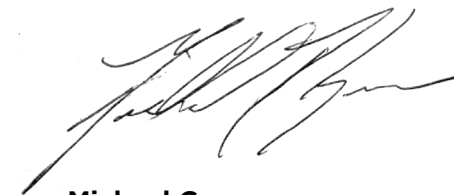
While this report is inclusive of input from over 200 statewide cultural nonprofits and another 1,500 individuals, we acknowledge that it isn’t a conclusive impact study — the pandemic’s impacts are far from over, and long-term ripples will continue be felt for generations. But, at the time of our data collection — 18 months into the pandemic — there is enough data to identify trends and begin to inform long-term lessons. This report both tracks the pandemic’s impacts on Washington State’s cultural nonprofits and the communities they serve, and establishes a new benchmark, against which we can measure recovery and growth. In addition, we offer data disaggregated by organizational size, geography, and racial identity.

In sharing this data collected by cultural organizations, the communities they serve, and a representative statewide public opinion poll, we weave together new information with the intent to better inform our community, decision makers, and the general public about the challenges and opportunities that lie ahead for the sector.

Relief funding is beginning to diminish, and yet recovery could take years. Much of pandemic-relief dollars were for restricted purposes related to the pandemic and not meant to help with the long-term sustainability of organizations. Disruptions to regular fundraising cycles can have lasting negative impacts to organizations dependent on that model. This is an opportunity to think differently—while cultural organizations are considering and implementing new business models and diversifying revenue streams, there is opportunity for government and policy makers, private funders and foundations, corporations and corporate funders, individual participants, and partner sectors to invest in the future of

the cultural sector. This investment in long-term growth initiatives will give organizations the space they need to develop programming and business models that are more resilient to future shocks and better positioned to serve patrons in this new and continually changing world.

At the core of ArtsFund’s mission is the belief that arts are essential to a healthy, equitable, and creative Washington. It is our intent that Washingtonians will use this report to support the cultural sector’s emergence, post-pandemic, more resilient, robust, and adaptive than before.



**Michael Greer**  
*President & CEO*



**Sarah Sidman**  
*Vice President of Strategic Initiatives & Communications*



**Sung Yang**  
*Chair, ArtsFund Board of Trustees*



**Sandy McDade**  
*Chair, ArtsFund Foundation Board*







## EXECUTIVE SUMMARY

### Introduction

There are many ways to chart and try to understand the near-and-long term effects of the COVID pandemic. This virus is having effects on the macro scale of global economics and public health all the way to individual well-being and connection to community. The COVID Cultural Impact Study is a deep dive into the Washington State nonprofit cultural community, aiming to document the impacts of the pandemic and to illuminate future trends and recommended actions moving forward. This research underscores that arts and culture will be critical in economic and community recovery. Acknowledging and investing in the sector and its workforce is an opportunity we cannot afford to miss.

Key findings from the study are summarized here, while the body of the report contains more findings disaggregated by size, geography, and Black, Indigenous, and other People of Color (BIPOC) identity of organization. Five case studies - LANGSTON, Seattle Art Museum, Spark Central, Tasveer, and TeenTix - illustrate these findings through a variety of organizational lenses.

### Scope and Definitions

The study uses several data sources: a Nonprofit Organizational Survey with 212 survey respondents across Washington State, a Cultural Participant Survey of 737 adults who had attended at least one cultural program since March 2020, and a Statewide Omnibus Poll which was a sample of 874 individuals representative of all Washington residents.

The study began in the Spring of 2021 and concluded data collection in early Fall of 2021. Re-opening was happening in phases across the state, and each organization was

making complex choices specific to their workforce, local policy, spaces, operations, and local transmission levels. At the time of their response, 53% of organizations were re-opened with limited capacity, 20% were opened at full capacity, and 26% had not reopened yet.

Data in the report is disaggregated by regions in Washington State based on groupings of counties. Black, Indigenous, and other People of Color (BIPOC) identity is self-reported by organizations with BIPOC staff and leadership, board, and/or those that primarily serve BIPOC communities. We also disaggregate by organizational size as defined by 2019 revenues.

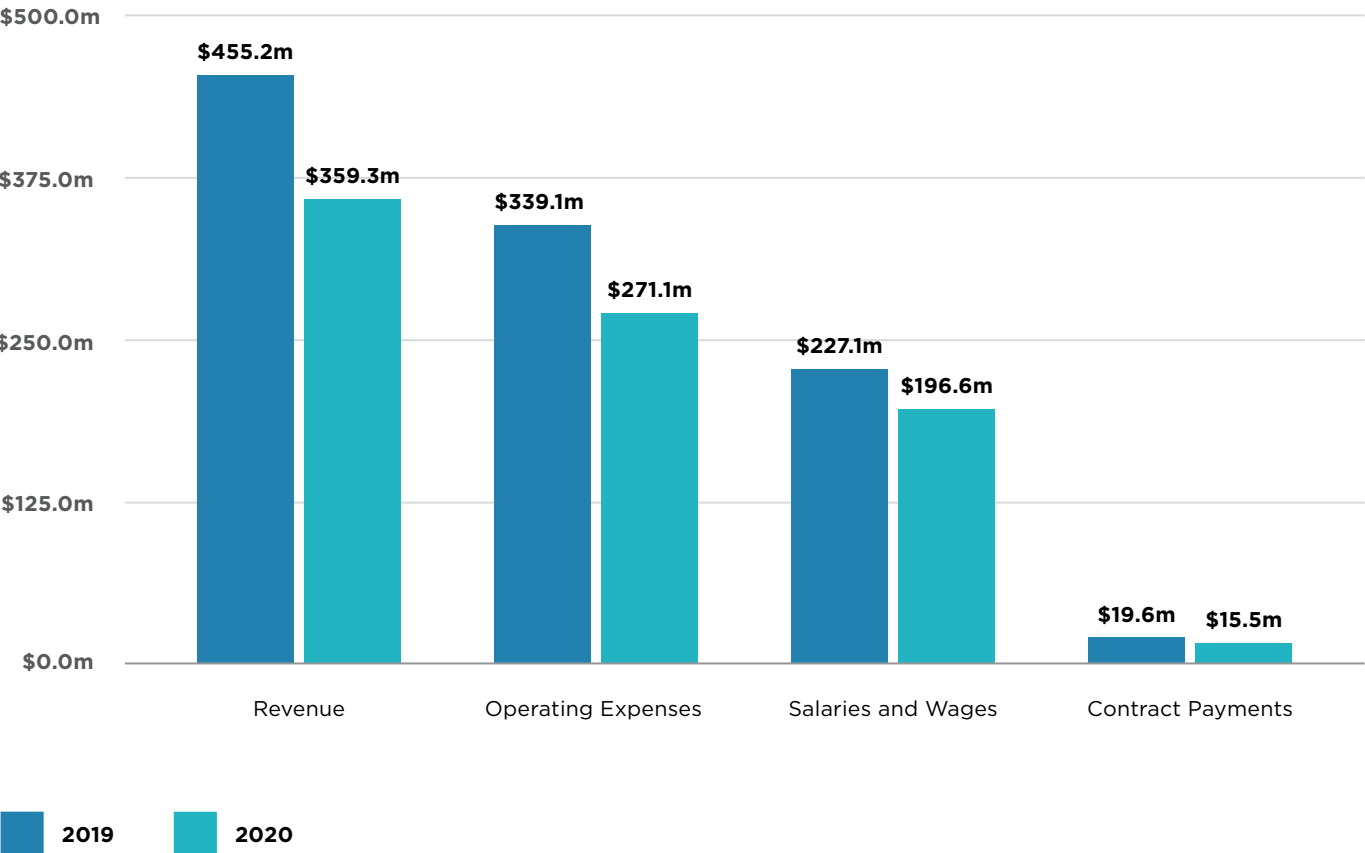
### Financial Impacts

The financial impacts have been profound for a sector that has historically been a driver of local economies, interacting with dining, hospitality, tourism, and recreation. Across the 121 reporting organizations, we found a drop of \$95.9 million, a 21% contraction, in overall revenue in the first year alone. The \$95.9 million loss in overall revenue is comprised of a \$131.6 million decrease in earned revenue (e.g., ticket sales) and a \$35.7 million increase in contributed revenue (e.g., pandemic relief, individual donations, grants). Without the increase in critical funding from the public sector, individuals, philanthropy and other actors, the cultural sector would have experienced loss at a much greater scale.

Organizational operating budgets were \$68.5 million lower in 2020 than in 2019. There was another \$32.3 million drop in payments to cultural workers including decreases in salaries and benefits and decreased payments to contractors.



Summary of 2019-2020 Changes to Cultural Organization Financials



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

Cultural Participation

There has been a significant drop off in the frequency of participation and of related spending from cultural participants. Three-quarters (76%) of surveyed cultural participants indicated that prior to the pandemic, they attended events once a month or more frequently. This figure dropped to 28% for the period between March 2020 and survey taking.

Though spending on tickets and fees decreased and became more dispersed from local markets, there has also been an increase in individual donations to local cultural organizations. Eighty-two percent (82%) of

cultural participants reported donating funds directly to local cultural organizations, and 70% of cultural participants say their level of financial support for organizations, outside of program tickets and fees, has increased since March of 2020. The data also shows that patterns of personal giving for cultural participants shifted to include more organizations as well as more funds per organization.

Access to Pandemic Relief

Pandemic relief funding was critical in the survival of most organizations through



the most intense period of the pandemic. Ninety-three percent (93%) of organizations responding to the survey were able to access at least one source of pandemic relief funds, and, on average, organizations accessed four different sources of relief funding. Access to contributed funds varied by organization size, BIPOC identity, and location to some degree.

The three most commonly accessed sources were all publicly sourced funding: the Nonprofit Community Recovery Grants (a program of the WA State Department of Commerce administered by ArtsFund), Paycheck Protection Program (PPP), and Public Statewide Emergency Relief Funding. On average, very large organizations (budgets over \$5M) accessed nearly three times as many sources of relief funding compared to very small organizations (budgets less than \$50K). They were also most likely to access federal PPP loans which accounted for the highest dollar amounts of relief, often more than all other types of relief combined.

Financial Survival Strategies

While pandemic relief and increased contributed revenue did offset some of the financial impacts, many organizations still had to resort to major operating budget cuts or spend down of operating reserves to withstand the loss of earned revenue. Forty-three percent (43%) of organizations temporarily closed programming facilities during the Stay Home, Stay Healthy order. Many used this closure to make needed upgrades to facilities, policies, and practices. Thirty-three percent (33%) of organizations reported having already spent down their operating reserves at the time of data collection.

Some organizations found the pandemic a unique opportunity to make changes to their internal financial policies and/or budgeting practices (42%). Of those, 57% anticipated these would be permanent changes. Thirty-



two percent (32%) have identified new revenue streams. Notably, the majority of organizations (80%) did not change ticket prices in response to the pandemic.

### Cultural Workforce Impacts

This workforce has been significantly impacted, to the degree that some have exited from their occupation and industry, prompting concern for a “cultural brain drain.”

Forty-one (41%) percent of organizations furloughed staff or reduced hours and/or pay. Only 6% believe it is permanent and 26% have plans to rehire, or otherwise increase staffing. However, 46% of organizations also implemented changes to the staffing model and of those 62% believe they are permanent changes. Among organizations that had opened in a full or limited capacity at the time of data collection, 41% report concern about hiring and rehiring staff.

### Shifts to Virtual and Digital Programming and Operations

By far, the shift from in-person to virtual operations for cultural programming was the most common change triggered among cultural nonprofits by the pandemic, affecting both the type and execution of programming, as well as the participation therein.

Seventy percent (70%) reported offering significantly more digital programming. Of those, 74% believe it is a permanent change. Eighty-one percent (81%) of organizations reported establishing or expanding remote work. Of those, 65% believe it is a permanent change. While overall participation in arts and cultural activities has declined drastically, over 33% of organizations also reported that they are seeing more cultural participation from outside their county.

Nearly half of cultural participant respondents (47%) indicated an intention to continue virtual participation. Eighteen percent (18%) of cultural participants preferred to continue to engage remotely only for the foreseeable future regardless of the availability of in-person programs.

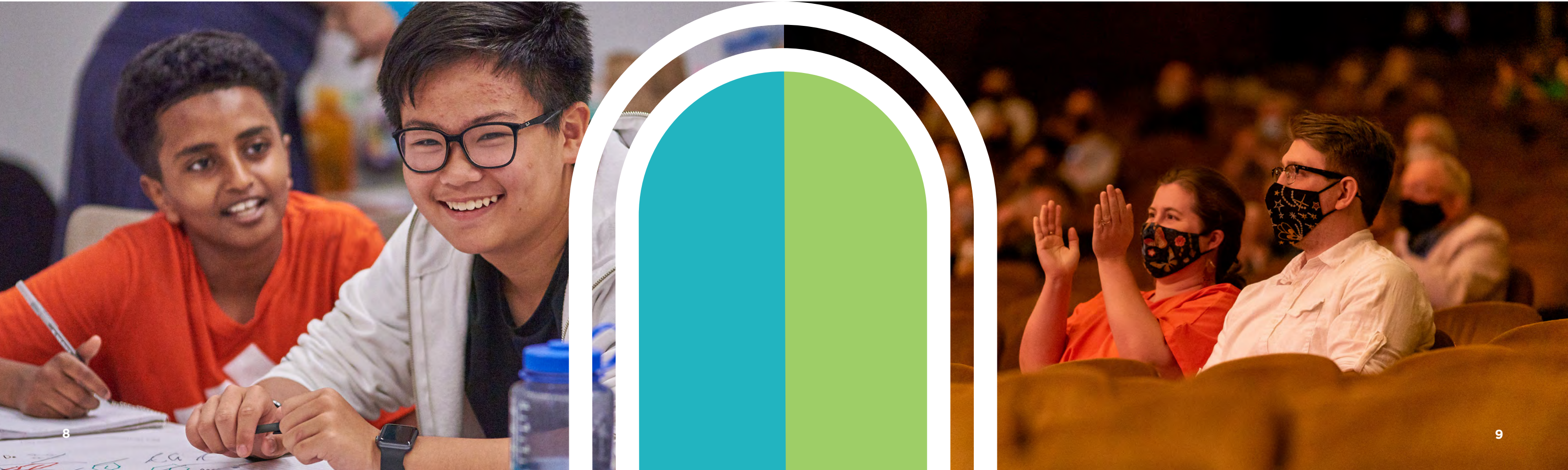
### New Lens on Accessibility

The move to digital programming has been associated with increased accessibility for certain participants, such as those with physical disability or impairment and those with barriers to transportation. However, the shift has also highlighted the impact of the digital divide in access to the arts, along with many other community resources. Organizations overwhelmingly indicated that continued investment and learning about accessibility will be a permanent change coming out of the pandemic.

Across surveyed organizations, nearly one-third had made accessibility improvements, and another 22% said they plan to. Eighty-four percent (84%) of those making the shift intend to make it permanent.

### Centering the Experiences of Black, Indigenous, and other People of Color

BIPOC-identifying organizations experienced significantly increased attention and funding in response to the events of 2020. Many BIPOC organizations ended the 2020 fiscal year with higher revenues than the previous year, despite the loss of earned revenue during this time. However, after that initial bump in contributed revenue, BIPOC-identifying organizations are seeing it drop back down by 50% between FY 2020 and FY 2021. There is concern that funder and individual giving priorities will shift and the 2020 dollars will not persist.





With a strong foundation in equity work, BIPOC-identifying organizations were also more likely than non-BIPOC organizations to report “Engag[ing] in new equity/anti-racism work” (76%) and more likely to report “Prioritiz[ing] centering more BIPOC (Black, Indigenous, People of Color) voices” (90%) during the pandemic. Organizations that did not identify as BIPOC also reported high rates of work in anti-racism (66%) and efforts to center BIPOC voices (67%).

## Reopening and Return to In-Person

Participants appear mostly ready to return but have not yet come back at pre-pandemic frequencies. They have also shifted in demography, geography, and have revised expectations for health, safety, and program delivery.

Over 70% of participant organizations were open at some level of capacity and responded that “Lack of certainty around participants’ willingness to return” was their primary challenge to reopening. This uncertainty around welcoming back in-person participants leaves cultural organizations in a wait-and-see pattern, with the long-term sustainability of the organization unclear.

Over 50% of individual respondents either reported that they were already returning to in-person events or were prepared to do so. For cultural participants, health and safety concerns now rank as decision factors along with the quality and content of the presenter and programming when considering whether to participate in offerings. Cultural participants are expecting to spend about half of what they spent prior to the pandemic on cultural participation.



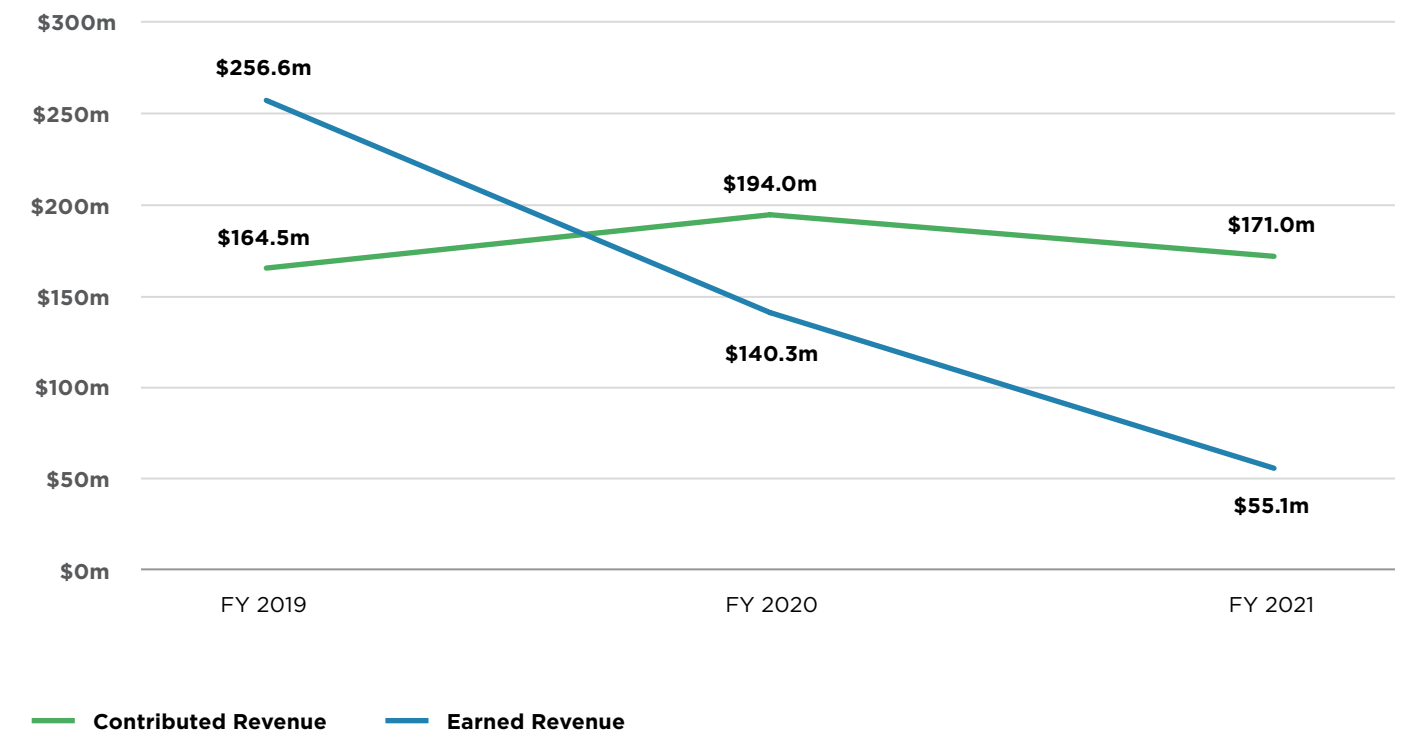
## Future Outlook

Audiences are recovering, but the data show a troubling continuation of downward trends in revenues and operating expenses, despite the hopes for a bounce back by the end of December 2021.

Total revenues across organizations declined by 14% between FY 2019 and FY 2020 and

declined again by 26% between FY 2020 and FY 2021. Earned revenue declined by 42% and again by another 51%. Qualitatively, there is growing concern about funder and individual giving priorities shifting away from relief and recovery for arts and culture, though organizations tell us that their rebuilding efforts will take years.

### Nonprofit Cultural Organization Revenue



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

## Rethinking the Cultural Organization

Organizations have long been grappling with questions such as “where does programming happen and how do participants interact in the future?” With the pandemic, they reported that the future was placed on their doorstep in a matter of days and weeks.

Participants are still there despite the pandemic-related barriers and cite a wide range of motivations. Fifty percent (50%) or more of the cultural participants cited key reasons for being engaged in cultural programs since March, 2020 including “experiencing art”, “makes me happy/brings me joy,” and “to support a community organization or program”.

The opportunities to rethink business models and organizations are exciting, but financial support and flexible time and space to transform operations are needed to take advantage of them.

## Role of Arts and Culture

This upheaval has made the essential role of arts and culture more expansive and urgent at

the same time that the providers are feeling the most resource constrained.

Ninety-three percent (93%) of cultural participant respondents indicate that role of arts and cultural organizations will be very or somewhat important to post pandemic recovery. The top roles they felt cultural non-profits should play are “economic recovery for businesses and organizations” (40%) and “encouraging community unity and vitality” (40%).

With 48% of cultural participants placing more value on cultural programming since March 2020 and the high level of importance they place on the role cultural organizations should play in recovery, this is an opportunity to engage and support the sector as a key actor in recovery and in the future.

## For Further Exploration and Research

We are not at the tail-end of a pandemic, we are at the beginning of a structural transformation. At the time that this report was produced, there was much yet to be known about the conditions of the world we

are entering. ArtsFund recommends continued research into the geography of arts access, individual patron behavior, labor impacts, public funding of the arts, engagement of the arts and culture in social and economic recovery, generational impacts on youth and their lifetime cultural participation, and equitable structural shifts.

## Recommendations

ArtsFund’s recommendations focus on five key areas highlighted for government and policy makers, cultural organizations, private funders, corporations and corporate funders, individual participants, and partner sectors.

- **Reimagine the role of arts and culture:** center the cultural sector in economic development strategies, encourage cross-sector partnerships, and generate new audience research.
- **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.
- **Protect the cultural workforce:** pilot models to increase cultural worker wages and wage stability, expand employment definitions and eligibility criteria, invest in services to make arts occupations more viable, and create avenues to share resources and learnings across organizations.
- **Focus on equity:** Actively eliminate funding barriers, engage youth and families, learn from and better serve disability communities, and help diminish the digital divide.
- **Support adaptation and survival:** Provide unrestricted, multi-year support, further access to technology, support public health initiatives, and participate and give!







## INTRODUCTION

The first recorded case of COVID in the United States was detected in an adult care home in Kirkland, Washington on February 27, 2020, but the global impact of the pandemic had already been unfolding for months. Over the course of twelve days, Washington State emergency orders went from prohibiting events with more than 250 people (March 11, 2020) to prohibiting gatherings of more than 50 people (March 16, 2020) to implementing the Stay Home, Stay Healthy order (March 23, 2020) requiring every Washingtonian to stay home unless they needed to pursue an essential activity. The impact to cultural organizations was immediate and acute as both audiences and staff were barred from participating and revenues dropped, for some, to zero. Following the acute period of shut down, a period of phased re-opening extended from May 2020 to June 2021

tied the ability to gather and open businesses to county-level health metrics. December 2020 saw the emergency approval of several vaccines which began to roll out in earnest across the Washington State in the first half of 2021. At the end of June 2021, thanks in part to high vaccine uptake rates, Washington State was declared fully open, only to experience a late summer surge in cases related to the Delta variant.

Though the pandemic timeline is not complete, this COVID Cultural Impact Study (CCIS) documents the impacts of the pandemic on Washington State's arts, cultural, heritage, and science nonprofit sector in 2020 and 2021. It begins to illuminate the future of the sector, and to identify key opportunities to shape that future. The study draws on three primary data sources:

- The Nonprofit Organizational Survey was open from July to September 2021 and asked arts, cultural, heritage, and science nonprofit organizations (hereafter referred to as “cultural organizations”) about their experience of the pandemic, financial impacts experienced, organizational shifts made as a result of the pandemic, and their needs and hopes for the future of the sector. The survey garnered 212 responses from cultural organizations across Washington State, with responses from 25 out of 39 counties.
- The Cultural Participant Survey was open to those who participated in at least one program offered by a Washington State organization since March 2020. This survey was promoted via cultural organizations’ membership lists, and through online channels. The survey received 737 responses from 21 counties. These data describe cultural participants’ attitudes and behaviors, the value they place on the arts, and their readiness to return and support the arts in various ways.
- The Statewide Omnibus Poll is a representative shared cost survey which uses an opt-in consumer panel. The poll was conducted by GMA Research and offers the perspectives of 874 residents across Washington State on the same topics as the Cultural Participant Survey.

We also reference public sources of data from the Washington Department of Health and the Washington Employment Security Department to provide additional context. Qualitative interviews with five organizations provide case studies of the pandemic experience and the path onward.

For most of us, the pandemic has created an environment of extreme uncertainty and an emotional rollercoaster alternating small moments of joy and triumph, with bouts of dread and disconnection. The journey for cultural organizations has been much the same. It is extremely challenging to sum up the experience in a concise way, and we must acknowledge that our data tells us about a specific moment in time and the perspectives we held in that moment. In particular, most of the data for this study were collected in late summer of 2021. Earlier in the year optimism about the efficacy of the COVID vaccines and rates of uptake led many cultural organizations to plan for major re-opening scenarios in the fall of 2021. As the summer progressed, it became clear that with the Delta variant, plateauing vaccination rates, and breakthrough infections, the scale of re-opening would not match initial hopes. In-person activities and fundraising events were once again scaled back or pivoted in response, and a discussion of recovery and re-opening evolved into discussions of long-term operations in a world where the COVID virus is endemic.



## Advisory Committee

Kate Becker, *Office of King County Executive Dow Constantine*

Jane Broom, *Microsoft Philanthropies*

Mason Burley, *Innovia Foundation*

Amy Chasanov, *The 5th Avenue Theatre*

David Fischer, *Tacoma Arts Live*

Melissa Huggins, *Spokane Arts*

Jason Hunke, *Vulcan Inc.*

Keri Kellerman: *Scanduzzi Krebs; formerly Whim W'Him*

Elizabeth MacPherson, *Mithun; ArtsFund Board member*

James Miles, *MENTOR Washington*

Markham McIntyre, *Seattle Metropolitan Chamber of Commerce*

Joan Rabinowitz, *Jack Straw Cultural Center*

Julia Reed, *Kinetic West*

Nina Yarbrough, *4Culture; formerly Central District Forum for Arts & Ideas*

## ArtsFund

Sarah Sidman, *Vice President of Strategic Initiatives & Communications*

Katy Corella, *Programs & Advocacy Manager*

Steffi Morrison, *Programs Coordinator*

## Policy & Advocacy Committee

Kumi Yamamoto Baruffi, *Executive Vice President and General Counsel, Columbia Bank*

Patrick Evans, *President & CEO, Sound; ArtsFund Board Vice Chair*

David Fischer, *Executive Director, Tacoma Arts Live*

Dwight Gee, *Arts advocate*

Elizabeth MacPherson, *Principal, Mithun*

Rachel McCall, *Vice-President and Assistant General Counsel, Weyerhaeuser Company*

Linda Walton, *Partner, Perkins Coie LLP*

Sung Yang, *President & CEO, Pacific Public Affairs, ArtsFund Board Chair*





## 2. FINDINGS

### 4.1. SCOPE AND DEFINITIONS

The COVID Cultural Impact Study aims to document the impacts of the pandemic on the cultural community, including nonprofit producers and presenters of art and culture, the workforce, and the public who participate in these cultural activities. Washington State residents, whether or not they directly participate in the arts, have also been impacted by the sector's contraction. For example, bars and restaurants that were supported primarily by proximity to cultural venues have been affected. We set out to explore the ways that the impact has differed across organizations by size, location, and Black, Indigenous, People of Color (BIPOC)-identity as well. This initial overview of the survey responses provides some context and introduces terms used in the remainder of the report to discuss differential impacts.

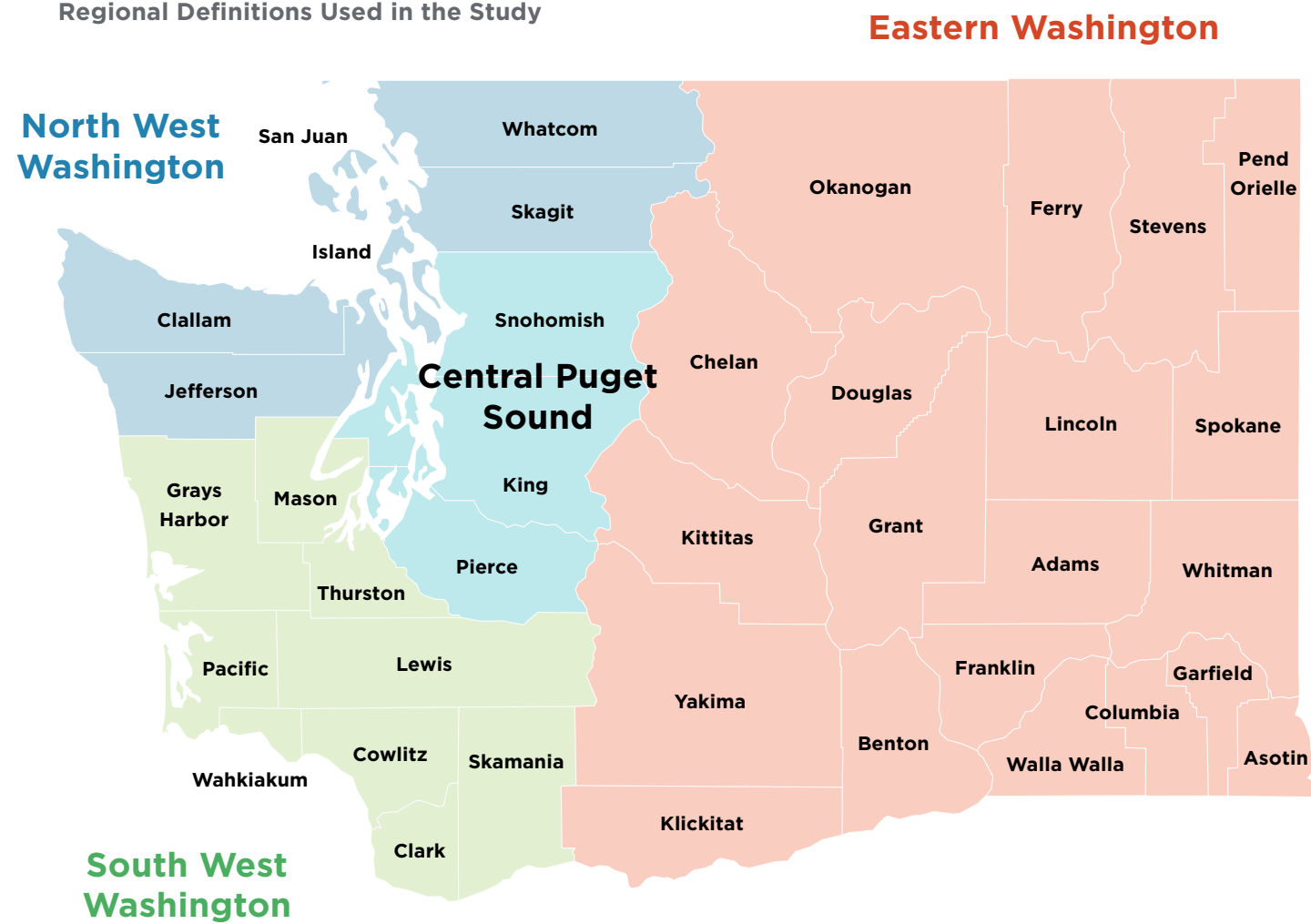
#### Nonprofit Organizational Survey

The Nonprofit Organizational Survey was open from Tuesday, July 27 until Friday, September 10, 2021. A total 212 survey responses were received from a diverse range of cultural organizations across Washington State. The geographic distribution of responses was weighted toward Central Puget Sound, organizations in King County alone accounted for 63% of responses. The regional definitions used in this study are based by county. The four county Central Puget Sound region has been the historical scope of ArtsFund's Economic Impact Studies conducted every five years since 1991. As this study was statewide in scope, the remaining counties were assigned to regions based on the geography and the distribution of responses to the Nonprofit Organizational Survey to allow meaningful comparisons (Exhibit 1 and Exhibit 2).

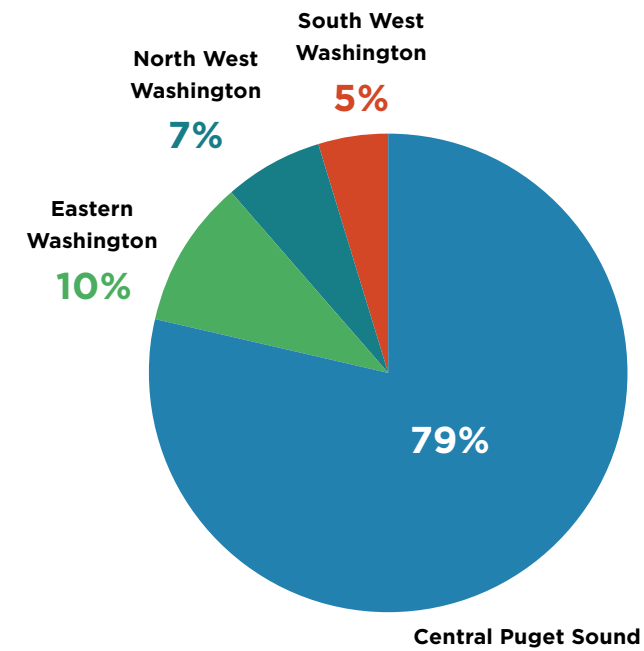




### Regional Definitions Used in the Study



### Nonprofit Organizational Survey Respondents by Region



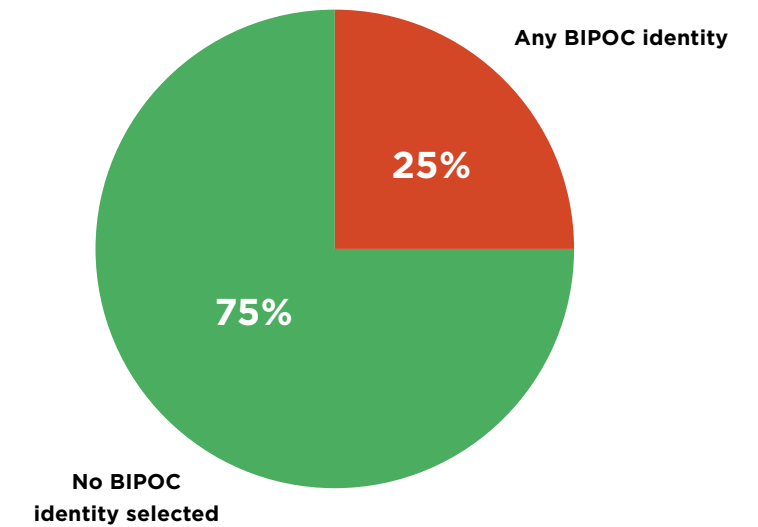
Source: ArtsFund CCIS Non-profit Organizational Survey, 2021; BERK, 2021.

The vast majority (95%) of organizations are 501c3 nonprofit organizations, the remaining 5% are fiscally sponsored by a 501c3.

One-quarter of respondents – 51 organizations – reported a Black, Indigenous, Person of Color (BIPOC) organizational identity, meaning they served primarily BIPOC communities, were led by a majority BIPOC board, and/or were led by primarily BIPOC staff (Exhibit 3).

Of those organizations that identified as BIPOC-centered, many indicated a high degree of overlap between having a majority BIPOC board and having majority BIPOC staff leadership. In fact, 19 organizations reported identifying

### Nonprofit Organizational Survey Respondents by BIPOC Identity

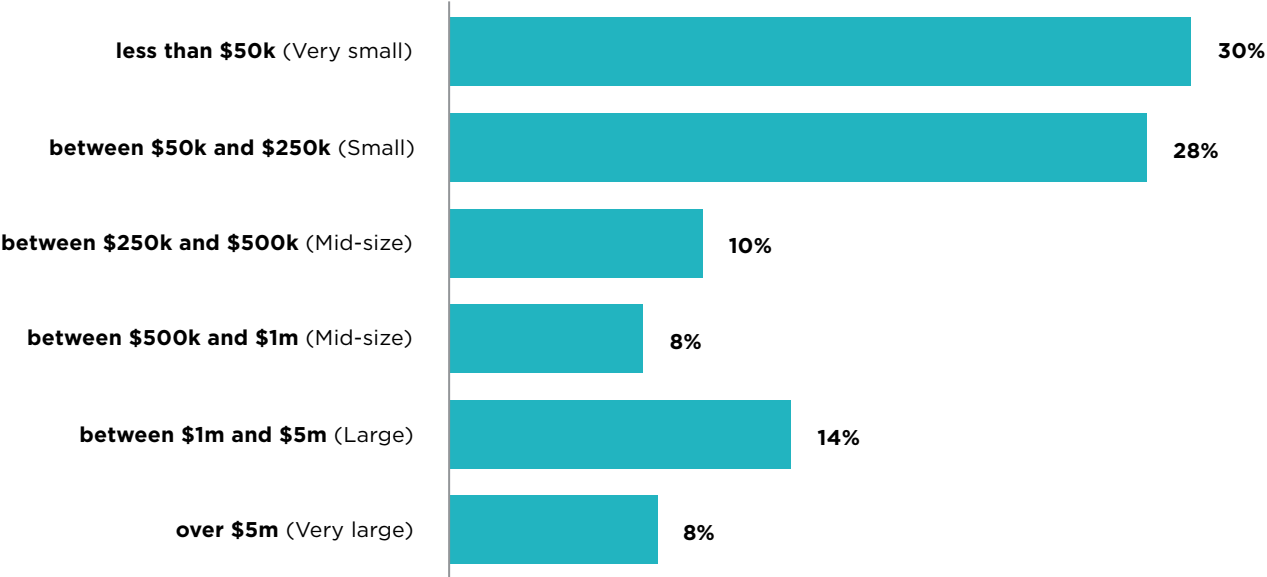


with all three dimensions. The remainder of the report refers to organizations who reported any of these dimensions as “BIPOC-identifying.”

Organizations were not required to provide financial information which resulted in a lower response rate for budget questions. Financial data was requested for three years (2019, 2020, and 2021) and on a fiscal year basis, which could vary by organization. Most organizations that reported financial information have either a December or a June end to their fiscal year.

Nearly one-third of survey respondents had organizational budgets below \$50,000 in 2019, in which case they were not prompted to complete the financial impacts section of the Nonprofit Organizational Survey, and another 28% had budgets between \$50,000 and \$250,000 (Exhibit 4). Most BIPOC-identifying organization budgets in our sample fell below \$250,000.

**Exhibit 4**  
Nonprofit Organizational Survey Respondents by Organization Size in 2019

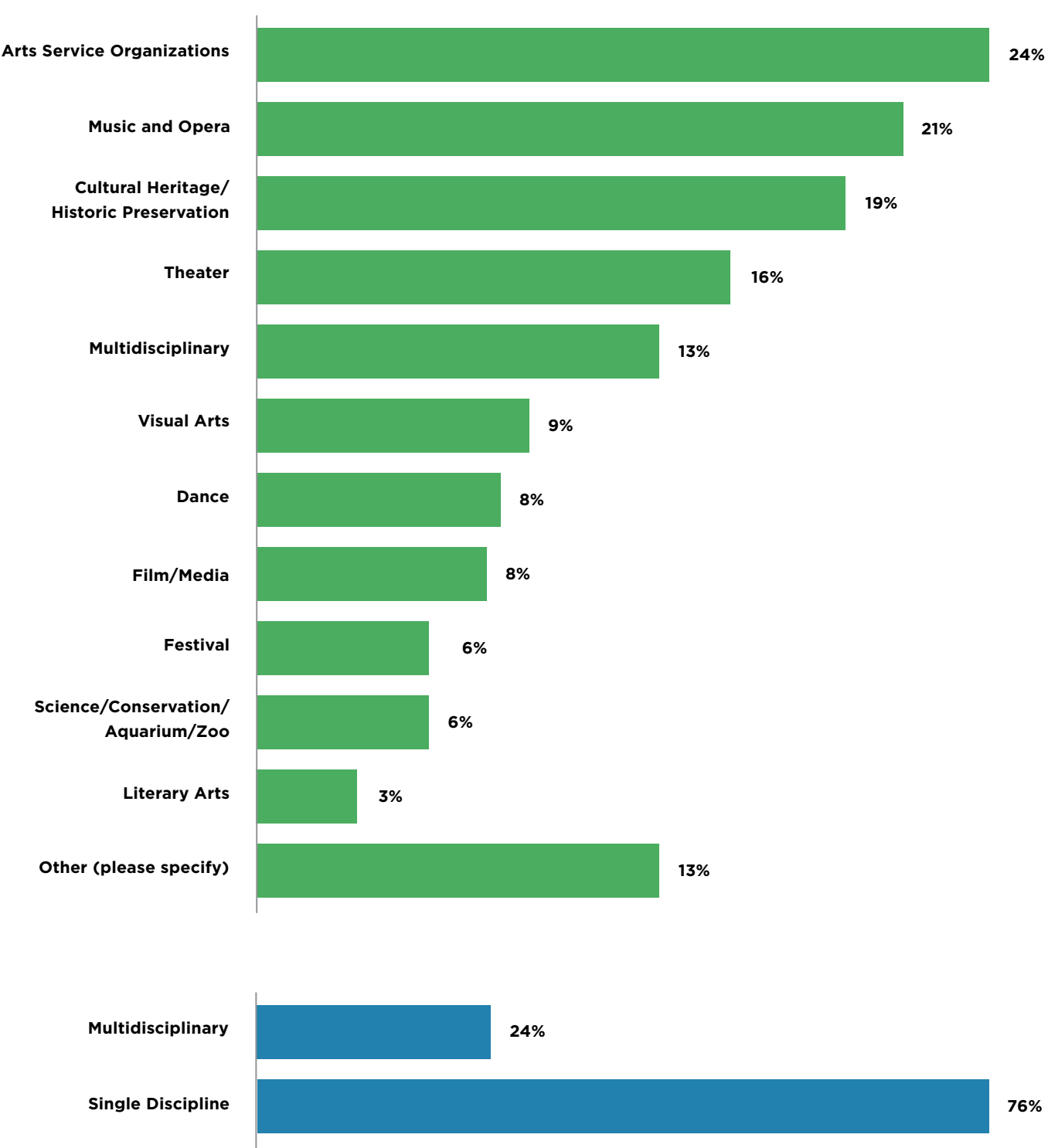


Source: ArtsFund CCIS Non-profit Organizational Survey, 2021; BERK, 2021.

There were a wide range of disciplines represented by survey respondents, with the most common being arts service organizations, music and opera, and cultural heritage/historic preservation (Exhibit 5). Traditionally, arts service organizations were defined as organizations that provide support to artists or cultural organizations, however, of the 30 respondents who selected this discipline as one of multiple disciplines for their organization, it is likely due to their

work using arts as a strategy in service to their community. Organizations could choose multiple disciplines and/or simply choose the category “multidisciplinary.” Using either definition, about one-quarter of organizations identified as multidisciplinary (24%) (Exhibit 5). Organizations with budgets below \$500,000 and BIPOC-identifying organizations were much more likely to identify as multidisciplinary.

**Exhibit 5**  
Nonprofit Organizational Survey Respondents by Discipline



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

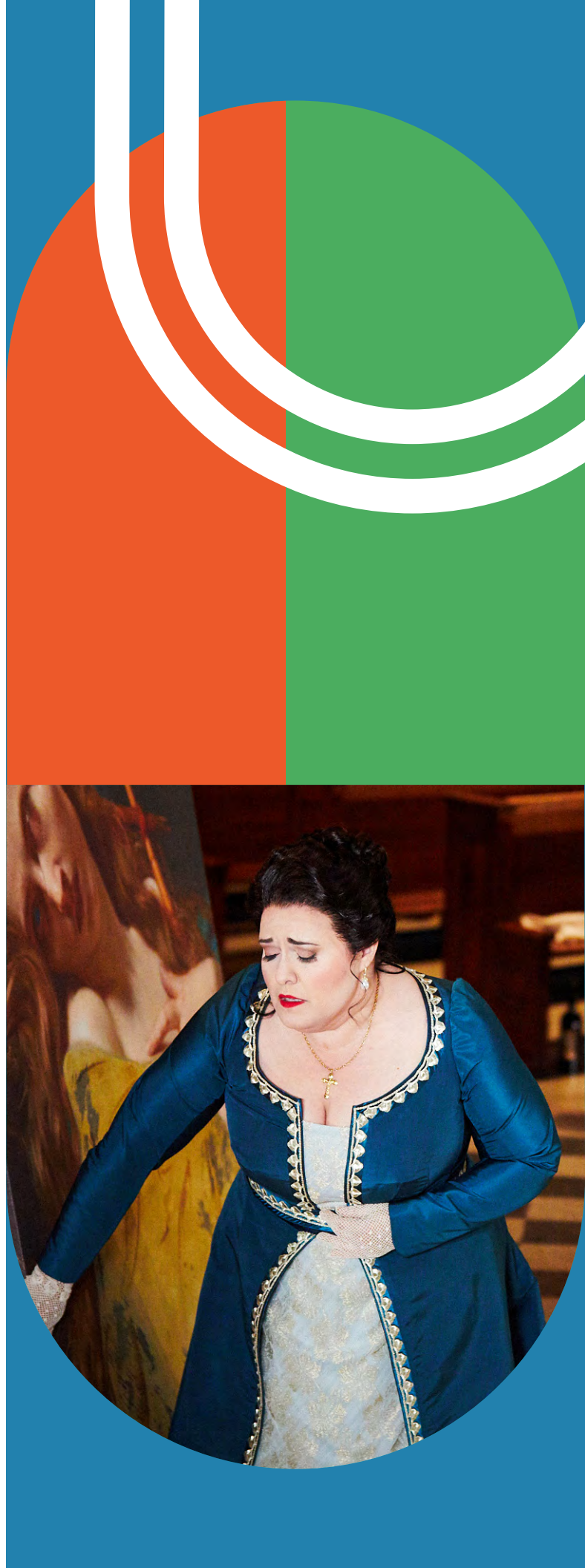


## Cultural Participant Survey

The Cultural Participant Survey targeted adults, 18 years-and-older with some connection to cultural organizations and who had attended a cultural production between March 2020 and September 2021. The survey received 737 responses from 21 counties. These respondents were recruited via multiple channels including through cultural organization mailing lists. The survey was conducted online. Participants were majority female (71%), white (80%), and between 45 and 64 years of age (65%). Asian participants made up 7% and Black and Hispanic respondents, 3% each. Most participants (64%) have incomes of \$100,000 or above and do not have children ages 18 and younger in the household (79%).

## Statewide Poll

GMA Research conducted a statewide representative survey of adults 18 years of age and older. This online poll had 874 respondents. The same questions were employed in both the Cultural Participant Survey and Statewide Poll. However, the Statewide Poll included all adults who may or may not have had attended a cultural production between March 2020 and September 2021. Polltakers were majority female (61%). Just over three quarters (77%) of respondents were 54 years old or younger and 75% had household incomes below \$100,000. Just over one-third had children under 18 in the household. The majority of polltakers were white (69%), followed by 9% Black, 9% Asian, and 7% Hispanic.



## 4.2. FINANCIAL IMPACTS

The full financial impacts of the COVID pandemic for organizations likely have yet to be realized. This section presents a snapshot of the most acute financial impacts of the crisis experienced during FY 2020 that included the Stay Home, Stay Healthy order starting on March 23, 2020. The description of impacts relies on both the Nonprofit Organizational Survey and findings from cultural participants about their levels of participation and spending during this time. Actual and projected impacts in FY 2021 are discussed in 6.1 Future Outlook.

The Nonprofit Organizational Survey collected detailed financial information with at least FY 2019 and FY 2020 data from 121 organizations. FY 2019 represents a full year of pre-pandemic operations. FY 2020 is the first pandemic affected year, but depending on the fiscal year end, it may represent three to nine months of affected operations. FY 2021 represents a full year of pandemic-affected operations, but may include a mix of actual and projected numbers, again dependent on fiscal year end dates and available data.

The following analysis compares FY 2019 and FY 2020 financials to characterize the financial impact of the first year of the pandemic in some key metrics.

As seen in Exhibit 6, across the 121 reporting organizations, we found a drop of \$95.9 million in overall revenue. There was another \$32.3 million drop in payments to cultural workers between decreases in salaries and benefits paid out and decreased payments to contractors (see Section 4.6). The Central Puget Sound region accounts for most of Washington State's cultural organizations by budget and most of the economic losses represented in the survey.

Operating budgets across the 121 reporting organizations also severely contracted during the pandemic. There was \$68.5 million less in 2020 operating budgets as compared to 2019,

a 20% contraction. Spending on salaries and contractor payments alone went down \$32.3 million, representing layoffs, furloughs, wage reductions, and contract cancellations.

Operating budgets dropped by

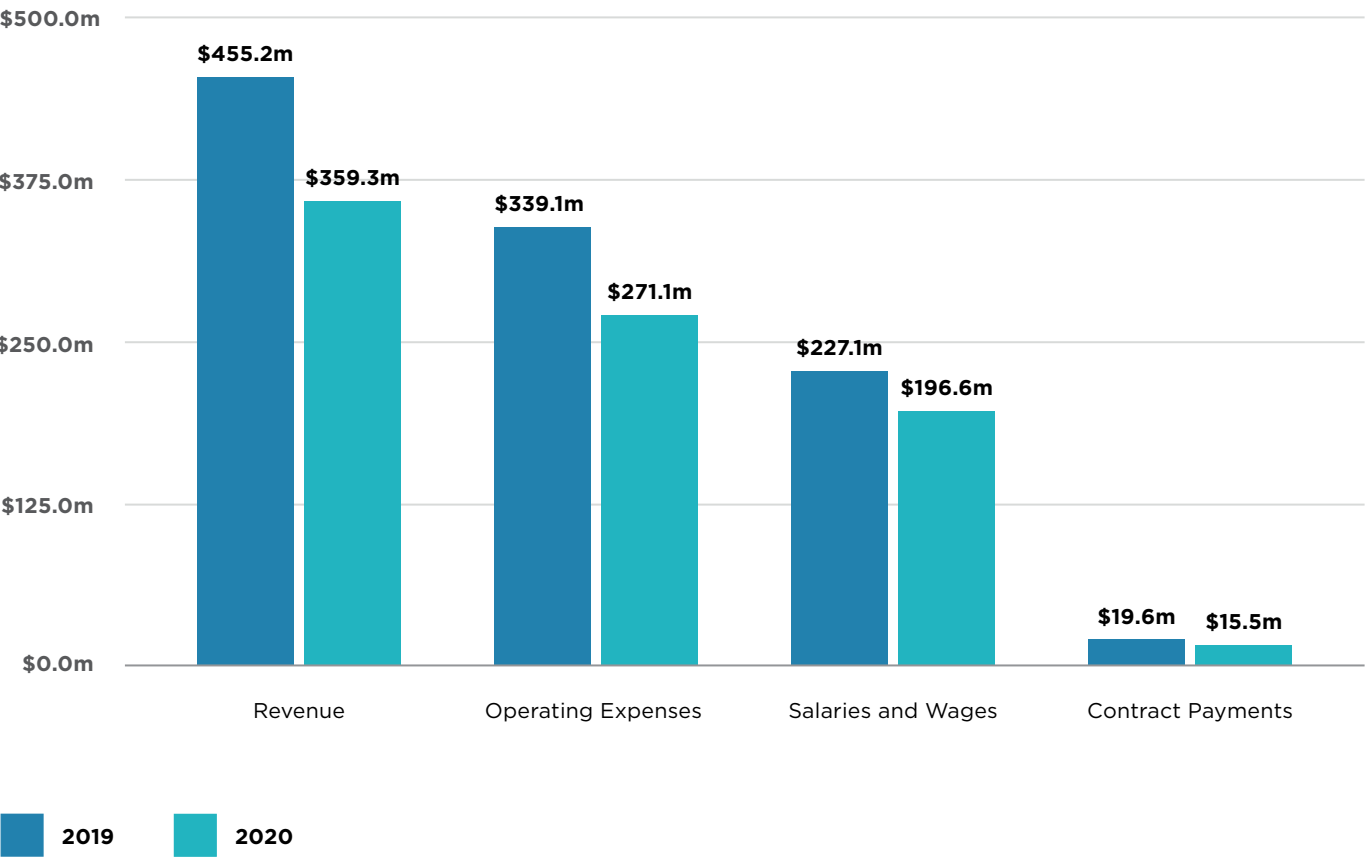
**\$68.5m**

in 2020, a **20%** contraction from 2019. Spending on salaries and contractor payments alone went down

**\$32.3m**

representing layoffs, furloughs, wage reductions, and contract cancellations.

Exhibit 6  
Summary of 2019-2020 Changes to Cultural Organization Financials



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

The \$95.9 million loss in overall revenue is comprised of a \$131.6 million decrease in earned revenue (e.g., ticket sales) and a \$35.7 million increase in contributed revenue (e.g., individual donations, grants). It is also crucial to note that increases in contributed revenue included massive infusions of pandemic relief funds (see Section 4.4). While these contributions were clearly instrumental in helping cultural organizations survive the most intense period of the shutdown, there is no reason to believe this high level of contribution will be available in future years.

Given the vast diversity of organizations by budget size and experiences during the pandemic, we report the financial impacts as median changes. Losses in attendance for individual organizations ranged from 55% to 100% of their 2019 base. Across all reporting organizations the median change was a 44% loss in earned revenue and a 10% increase in contributed revenue (Exhibit 7). Earned revenue losses also did not necessarily move in proportion with participant losses. The main exception was very small organizations where

participant losses of 94% showed up as earned income losses of 82%.

Larger organizations were more likely to have larger proportional increases in contributed income. For example, organizations over \$5 million in budget size had a median increase in contributed revenue of 26%. Much of this likely reflects access to Paycheck Protection Program (PPP) loans which were much more likely to be taken by larger organizations and could cover up to five months of payroll (if they accessed both rounds).

BIPOC-identifying organizations typically saw 15% increases in total revenue, driven by

median increases in contributed revenue of 28% over their FY 2019 baseline budgets. This may reflect the impact from some funders focusing on racial equity in grantmaking and the intentional distribution of relief funds. However, while a positive sign, it is crucial to remember that these organizations as a group had much smaller budgets than non-BIPOC-identifying organizations, and the percentages reported are in proportion to these baseline budgets. In other words, these figures do not necessarily reflect a significant shift in where total dollars are flowing.





Exhibit 7  
Median Change in Key Financial Metrics between FY 2019 and FY 2020

	n=	% Change in Total Revenue	% Change in Earned Revenue	% Change in Contributed Revenue	% Change in OpEx	% Change in Attendance
All Reporting Organizations	121	-15%	-44%	10%	-19%	-81%
By Size: Median						
less than \$50k	12	-22%	-82%	13%	-31%	-94%
between \$50k and \$250k	44	-10%	-42%	13%	-28%	-83%
between \$250k and \$500k	16	-19%	-33%	5%	-17%	-72%
between \$500k and \$1m	13	-1%	-44%	10%	-4%	-90%
over \$5m	13	-24%	-35%	26%	-19%	-55%
By Region: Median						
King	85	-8%	-32%	14%	-14%	-75%
Central Puget Sound	100	-12%	-35%	10%	-17%	-79%
Eastern Washington	7	-21%	-51%	9%	-29%	-62%
North West Washington	8	-32%	-71%	12%	-52%	-95%
South West Washington	6	-60%	-82%	-12%	-22%	-100%
By BIPOC: Median						
None of the above	97	-19%	-46%	8%	-20%	-74%
Any BIPOC identity	22	15%	-30%	28%	0%	-90%

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

**KEY FINDING:** Organizations reported a **\$95.9 million** loss in overall revenue in the first year alone, which is comprised of a **\$131.6 million** decrease in earned revenue (e.g., ticket sales) and a **\$35.7 million** increase in contributed revenue (e.g., individual donations, grants).

### 4.3. CULTURAL PARTICIPATION

We turn to the Cultural Participant Survey to better understand how participant behavior and spending changed during this time. This survey of adults who had attended at least one cultural program since March 2020 received 737 responses.

Prior to March 2020 cultural participants were very much engaged with events, programs, and activities with 76% reporting a frequency of monthly or more often (Exhibit 8). From March 2020 to the time the survey was conducted in late August/September of 2021, only 28% of cultural participants noted they were involved at a frequency of once a month or more.



Exhibit 8  
Responses to *How frequently did you participate in cultural programs?*

	Prior to March 2020	From March 2020 to survey completion
Weekly or more	29%	8%
At least once a month	47%	20%
At least once a quarter	16%	26%
At least twice a year	4%	15%
Once a year or less	2%	15%
Not at all	1%	17%

Sources: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

The disciplines with the most participants since March 2020 were Music and Opera (46%), Theater (45%), Visual Arts (37%) and Film/Media (37%) (Exhibit 9). About half (53%) of cultural participants polled say they have engaged in a new or different content-driven cultural program.

Though spending on tickets and fees decreased and became more dispersed from local markets, there has also been an increase in individual donations to local cultural organizations. Eighty-two percent (82%)

**Exhibit 9**  
Responses to *Since March 2020, what types of cultural programming have you participated in?*

	Cultural Participant
Music and Opera	46%
Theater	45%
Visual Arts	37%
Film/Media	37%
Cultural heritage/ Historic preservation	28%
Dance	23%
Literary arts	23%
Festival	17%
Science/Conservation/ Aquarium/Zoo	16%
Multidisciplinary	13%
Other (please specify)	8%

Sources: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

of cultural participants reported donating funds directly to local cultural organizations (Exhibit 10). Patterns of personal giving for cultural participants also shifted (Exhibit 11). Overwhelmingly, 7 out of 10 cultural participants say their level of financial support for organizations, outside of program tickets and fees, has increased since March 2020. Most notably, 41% say they donate to more organizations than before while 29% say they donate more funds per organization.



**Exhibit 10**  
Responses to *Outside of program tickets, how have you supported local cultural organizations since March 2020?"*

	Cultural Participant
I have donated funds to cultural organizations	82%
I have attended fundraisers for cultural organizations and donated	42%
I have donated funds to COVID relief funds for artists	32%
I am a volunteer at a cultural organization	32%
I have donated funds to COVID relief funds for cultural organizations	31%
None of these	6%
Other (please specify)	6%

Sources: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

**Exhibit 11**  
Responses to *How has your financial support to cultural organizations (outside of program tickets and fees) changed, if at all, since March 2020?*

	Cultural Participant
Donate to more organizations	41%
Donate more funds per organization	29%
Level of support has not changed since March 2020	28%
Donate to fewer organizations	14%
Donate fewer funds per organization	9%

Sources: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.



**KEY FINDING:** Cultural participation declined in frequency with the onset of the pandemic, but cultural participants donated funds to organizations **(82%)**, donated to more organizations **(41%)**, and donated more funds per organization **(29%)** in response.



## 4.4. ACCESS TO PANDEMIC RELIEF

The vast majority of organizations responding to the survey were able to access at least one source of pandemic relief funds. Available sources include direct grants, loans, and debt relief (Exhibit 12). Only 12 organizations (7%) reported accessing no pandemic relief funds. Of these organizations, about half reported they did not qualify, and the other half believed they qualified but did not have the capacity to apply for these funds. Pandemic-relief funds were for restricted purposes related to the pandemic and not meant to help with the long-term sustainability of organizations. Each funding source also varied in scale of dollar amounts. Federal funds like the Payroll Protection Program (PPP) were worth millions of dollars for large organizations, dwarfing state, local, and private philanthropy sources that typically offered lower barrier funding and smaller dollar amounts.

The Nonprofit Community Recovery Grants administered by ArtsFund in partnership with the Washington State Department of Commerce distributed \$10.78 million of state funding in the summer of 2021 to 702 nonprofits including but not limited to cultural organizations located in 34 of Washington’s 39 counties. Among the cultural organizations surveyed for this study, 76% received a Nonprofit Community Recovery grant, making it the most accessed form of pandemic relief funding among survey respondents.

There were several public and statewide emergency relief programs, many of which

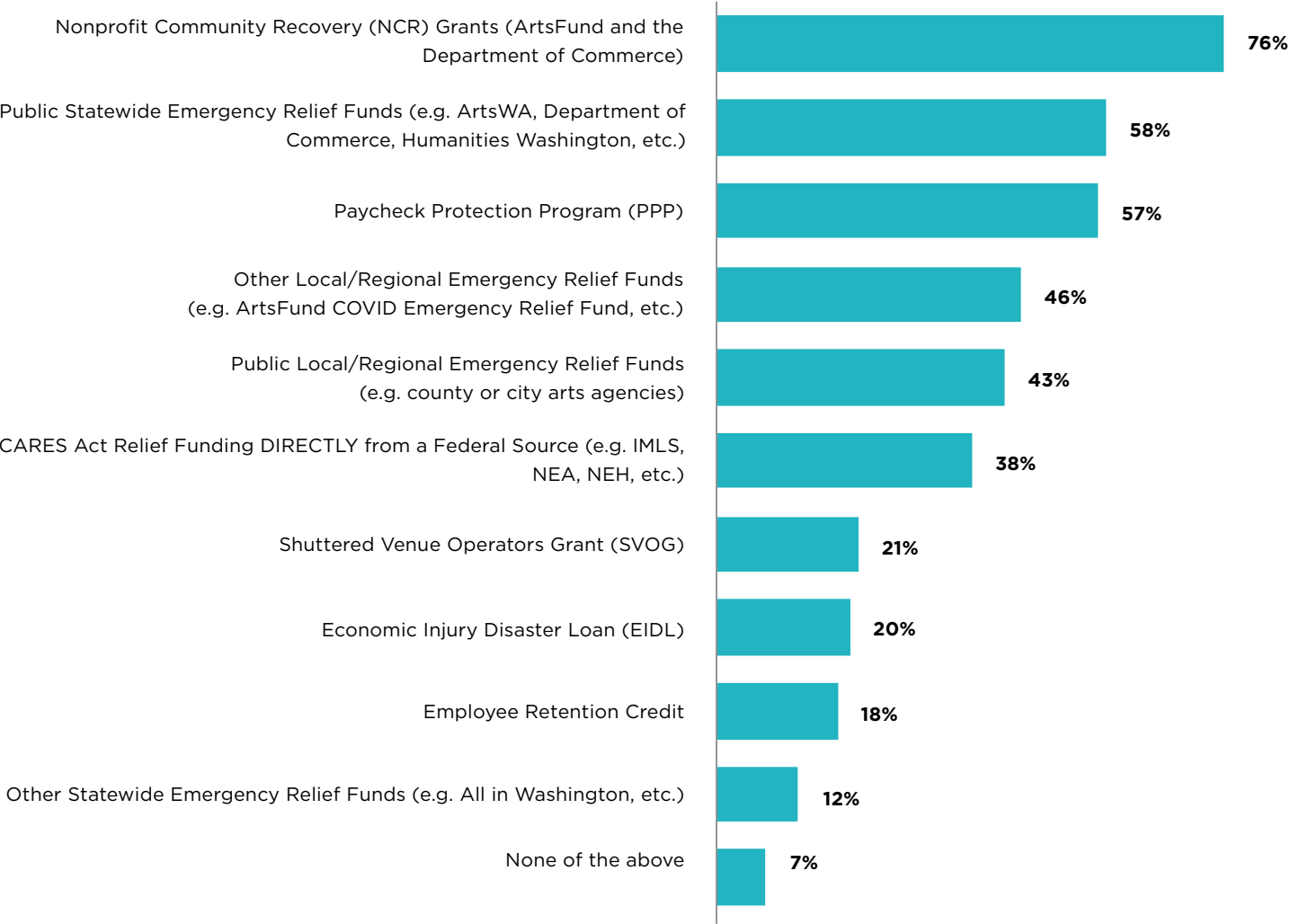
were deployed earlier in the pandemic. These included the ArtsWA program with the Department of Commerce to distribute \$3.84 million of federal Coronavirus Aid, Relief, and Economic Security (CARES) Act funding in mid to late 2020. These funds provided up to \$10,000 for general operating support to 447 cultural organizations. Humanities Washington also ran a relief program supporting 108 cultural organizations with \$500,000 CARES Act funds via the National Endowment for the Humanities. These programs were the second most accessed relief type among respondents.

The third most accessed program, and one that offered the greatest dollar amounts of relief, was the federal PPP active in June and August 2020. This funding was made available as a private loan equal to approximately 2.5 times the applicant’s average monthly payroll costs, and could be applied for twice, though the second round had different eligibility criteria. The funds could be used for payroll, rent, interest, and utilities. The application process required engaging a private bank, credit union, or other approved lender. It also used definitions of losses and employment that made it difficult for organizations that relied on volunteers, freelance workers, and gig workers from applying or access the full benefit. Organizations receiving the loan could then apply for loan forgiveness.





Exhibit 12  
Access to Pandemic Relief Funds



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

Access to some forms of pandemic relief varied by location (Exhibit 13). For example, counties with more robust public funding infrastructure, such as King County with 4Culture and the City of Seattle Office of Arts & Culture had the highest rates of access to public local and regional emergency relief funds. North West Washington was also relatively well served by local funds. Organizations in Eastern Washington and South West Washington were unlikely to access local and regional relief funds.

Organizations in North West Washington on average reported accessing 4.44 different

sources of relief funding, while those in South West Washington on average accessed 2.75 sources.

Access to funds varied by organization size, with smaller organizations typically being the least likely to access relief funds.

Exhibit 13  
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.

Access to funds also varied by organization size, with smaller organizations typically being the least likely to access relief funds (Exhibit 14). This trend was most pronounced with federal programs such as the PPP, the Shuttered Venues Operator Grant, and the Employee Retention Credit, which also offered the highest dollar amounts of relief. Smaller organizations that did access relief funds

accessed fewer sources on average. Very small organizations accessed 2.18 sources on average while very large organizations accessed 5.92 different sources of relief funding on average. Based on our sample of respondents, smaller organizations are more likely BIPOC-identifying, an important intersection to consider with access to pandemic relief.

Exhibit 14

Access to Pandemic Relief Funds by Organization Size

	Less than \$50k	Between \$50k and \$250k	Between \$250k and \$500k	Between \$500k and \$1m	Over \$5m
Average Number of Sources Accessed	2.18	3.98	5.44	4.69	5.92
Nonprofit Community Recovery (NCR) Grants (ArtsFund and the Department of Commerce)	61%	85%	88%	69%	75%
Public Statewide Emergency Relief Funds (e.g. ArtsWA, Department of Commerce, Humanities Washington, etc.)	31%	67%	88%	69%	75%
Paycheck Protection Program (PPP)	14%	50%	88%	100%	100%
Other Local/Regional Emergency Relief Funds (e.g. ArtsFund COVID Emergency Relief Fund, etc.)	20%	50%	63%	62%	67%
Public Local/Regional Emergency Relief Funds (e.g. county or city arts agencies)	24%	43%	63%	54%	58%
CARES Act Relief Funding DIRECTLY from a Federal Source (e.g. IMLS, NEA, NEH, etc.)	27%	39%	50%	31%	42%
Shuttered Venue Operators Grant (SVOG)	6%	11%	31%	31%	75%
Economic Injury Disaster Loan (EIDL)	8%	22%	25%	31%	17%
Employee Retention Credit	2%	7%	31%	8%	75%
Other Statewide Emergency Relief Funds (e.g. All in Washington, etc.)	14%	9%	13%	15%	0%

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

Importantly, arts and culture were not just on the receiving end of pandemic relief. Stories of arts communities finding new uses for their assets and creative energies to support their neighbors in need abounded. Nearly 50 organizations reported that they planned to, or already had “Shift(ed) to community responsive programming (e.g., meeting basic

food and income needs, hosting blood drives, etc. during the pandemic).” Even as their future was uncertain, the cultural community stepped forward to open and repurpose their spaces, volunteer time, make personal protective equipment (PPE), and undertake other mutual aid efforts to meet the basic needs of their communities.



**Kitsap County Nonprofit Cultural Organization**

[Our] Executive Director became part of the city’s Emergency Response team and offered its creative resources in many ways. [Our] volunteers made more than 5,000 face masks, thousands of meals for people across northern Kitsap County experiencing food insecurity, parts for personal protective equipment (PPE), face shields, and straps to help lift mask straps off of ears. Our wood shop built wheeled bins for our local food bank so they could leave food outside for folks to take, while preventing critters from getting into the food. We are poised to step up again, as needed

**KEY FINDING:** Ninety-three percent (93%) of organizations received some type of pandemic relief funding. The top three relief programs accessed were funded by public sources.

See Case Study: [LANGSTON](#)



# 4.5. FINANCIAL SURVIVAL STRATEGIES

While pandemic relief and increased contributed revenue offset some of the financial impacts, many organizations still had to resort to major operating budget cuts or spend down operating reserves to withstand the loss of participants and earned revenue. Overall reductions in operating budgets were summarized in the previous section. This section provides detail on what those reductions entailed, and the following section dives deeper into reductions in workforce and associated impacts.

Forty-three percent (43%) of organizations temporarily closed programming facilities during the Stay Home, Stay Healthy order, saving on some but not all operations and maintenance costs. Visual arts organizations and those with performance spaces continued to incur high fixed costs during this time. While costly, it was not all wasted. A majority (79%) of organizations with budgets over \$5 million reported taking the time to “Renovate or plan renovations (e.g., public health mandated modifications, ADA compliance, etc.).” For those who rented their space, 9% reported exiting their lease during this time, and another 9% subleased their space; this practice was concentrated among very small to mid-size organizations.

Many organizations are leaving the peak of the pandemic experience in a much more financially precarious position than when they entered. One-third of organizations reported

**King County Nonprofit Cultural Organization**

[We] had to leave our space suddenly because we could no longer afford rent without our earned income streams. We are now operating remotely and offering online and in-person programming across the city as we build a plan for our next home.

having already spent down their operating reserves and another 10% expect to do so. BIPOC-identifying organizations and those in South West Washington were the most likely to report a spend down. Of course, not all organizations entered the pandemic with significant operating reserves.

Yet there are some bright spots. Some organizations found the pandemic a unique opportunity to make changes to their internal financial policies and/or budgeting practices (42%). Of those, 57% anticipated these would be permanent changes. Arts administrators may not have found the time and capacity to do so under a normal programming year. One-third (32%) identified new revenue streams. Notably, the majority of organizations (80%) did not change ticket prices in response to the pandemic and instead opted to be more creative with new revenue streams such as merchandise.

**KEY FINDING:** Forty-three percent (43%) of organizations temporarily closed programming facilities during the Stay Home, Stay Healthy order. One-third spent down operating reserves and another 10% expect to do so.

See Case Study: [Seattle Art Museum](#)

**King County Nonprofit Cultural Organization**

We weren't in particularly strong financial shape before the pandemic, and within a few weeks of the shutdown we were completely out of money. Everyone was furloughed almost immediately. The staff and community rallied to keep the organization alive. PPP (and other federal stimulus) made it possible to bring staff back on. We completely changed our operations and adapted to the new environment. This process [has] actually ended up being healthy for the organization. We're now in the most stable financial position in decades and are actively planning for what future growth looks like.



# 4.6. CULTURAL WORKFORCE IMPACTS

For organizations that cut operating budgets to survive, that translated to reductions in hours, furloughs, and layoffs to employees and contract workers. The aggregate impact to the cultural workforce has been significant, and even official data sources tend to underestimate the impact as cultural workers do not always show up in official employment statistics.

Forty-one percent (41%) of organizations furloughed staff or reduced hours and/or pay across the organization. Only 6% believe it is permanent and 26% plan to “increase the number of staff” relative to their levels at the time of the survey. However, 46% of organizations implemented changes to the staffing model and of those, 62% believe they are permanent changes. These data seem to signal a more structural shift in how cultural organizations will interact with the cultural workforce and behave as employers in the years to come.

In many cases, PPP relief was larger than all other forms of relief funding combined and

contributed greatly to organizations being able to retain staff. However, in line with national trends, it appears that even the massive PPP was not able to prevent all layoffs over the extended duration of the pandemic. Of the 96 organizations that reported successfully accessing PPP, 44 (46%) also indicated they had already or plan to have employee layoffs and furloughs.

There was a nearly 80% drop in the number of employees reported to the Washington Employment Security Department (ESD) between 2019 and 2020 (likely the quarter most impacted by the pandemic) (Exhibit 15). While the sector had rebounded somewhat by the first quarter of 2021, the reported workforce is at 60% of the pre-pandemic base and wages are at 68% of pre-pandemic level. These figures are likely an understatement as they do not include the significant numbers of self-employed artists and creative contractors who are not eligible for unemployment insurance.

**Exhibit 15**  
**Washington State Arts and Cultural Institution Reported Employees and Wages**

	Q2 2019	Q2 2020	Q1 2021
Total establishments reporting	474	214	499
Average Employees Per Establishment	18	9	11
Average Wages Per Establishment (Quarterly)	\$176,791	\$89,574	\$113,535

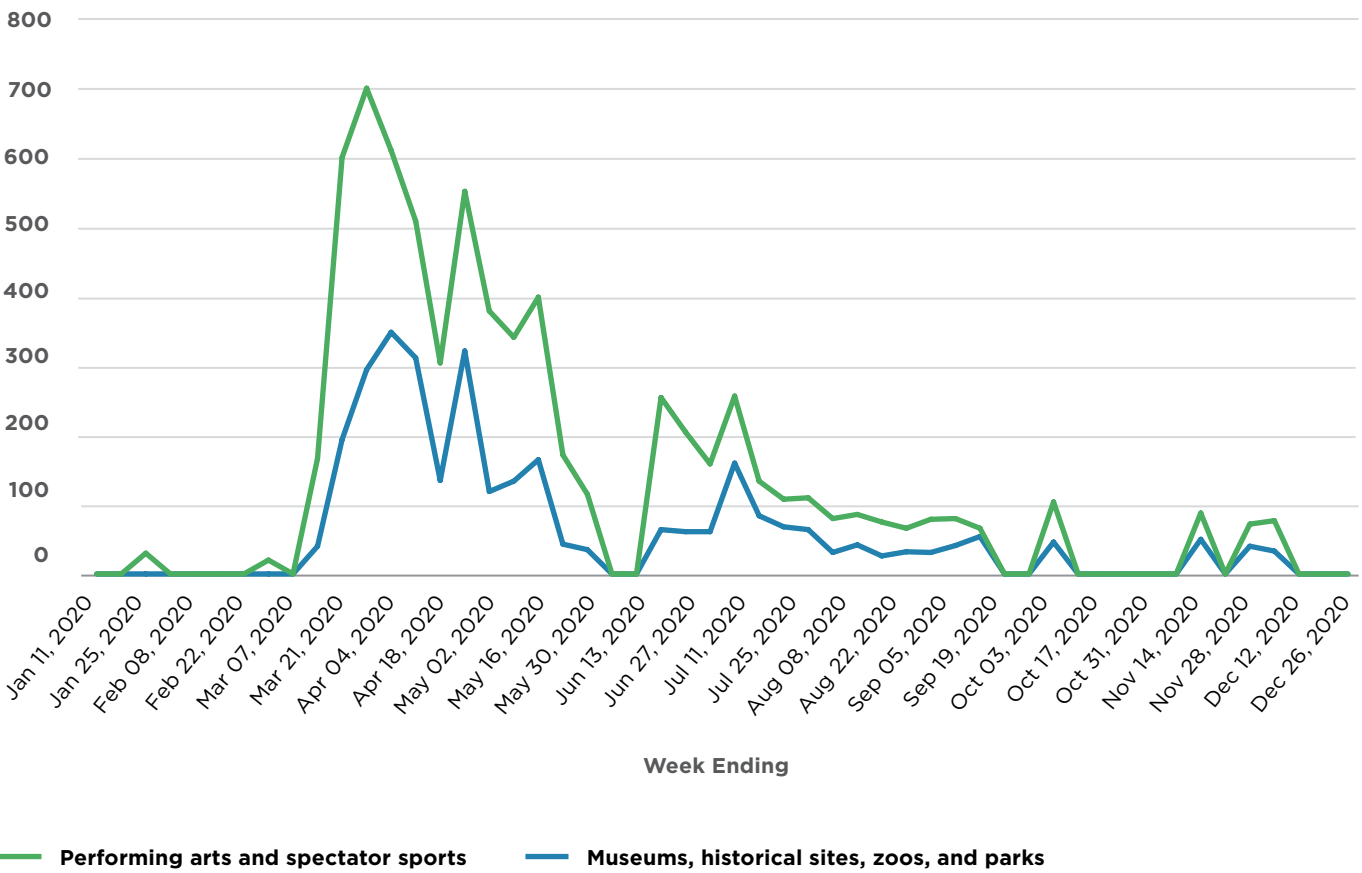
*Note: This analysis includes only organizations that primarily reported a NAICS of 7111: Performing Arts Organization or 712: Museums, Zoos, Historical Sites, or Parks. Many of the 2,500 organizations considered an arts or cultural organization for the nonprofit organizational survey may be classified under another NAICS, such as social and educational services, or not report wages to ESD.*

*Source: Bureau of Labor Statistics Quarterly Census of Employment and Wages, 2021; BERK, 2021.*

Weekly unemployment claims data show that over 10,000 Washington State workers in the industries of performing arts, spectator sports, and museums, historical sites, zoos, and parks

filed an initial claim for unemployment in the 39 weeks between January 2020 and October 2021 (Exhibit 16).

**Exhibit 16**  
**Washington State Weekly Unemployment Claims in Performing Arts and Spectator Sports, Museums, Historical Sites, Zoos and Parks.**



*Note: This analysis includes organizations that reported under a NAICS of 711: Performing Arts Organization and Spectator Sports and 712: Museums, Zoos, Historical Sites, or Parks.*

*Source: Washington State Employment Security Department, 2021; BERK, 2021.*



What these aggregate statewide numbers mask is the experience and impact at the individual organization and staff level. Each nonprofit worker filing an initial unemployment claim was likely paid below market median wages to begin with and had been working in a sector that offers little job security. Layoffs and furloughs associated with the pandemic may have triggered exits from the sector. The pandemic also led many households and individuals in urban areas where arts organizations are concentrated to move to suburban and rural areas in search of lower population density and more affordable housing.

The current phase of the pandemic has been coined by some “the Great Resignation” as employers, particularly in hospitality and leisure industries, face massive worker shortages as people have left the workforce.


The Nonprofit Organizational Survey asked what organizations thought would be the greatest

challenge to re-opening. Hiring and rehiring staff ranked 7th out of 10 possible choices, behind concerns about cash flow and bringing participants back. However, organizations that had already opened in a full or limited capacity were much more likely to be concerned about hiring and rehiring staff (Exhibit 17). Very large organizations were also much more likely to report hiring and rehiring staff as one of their top three concerns (Exhibit 18). It seems for arts producing organizations, the specter of a cultural “brain drain” is just starting to come into focus as they move to open doors and find the staff they need are not available. The workers who remain are facing significant stress and burnout as they are stretched to cover multiple roles while handling the panoply of COVID-related stressors, such as pivoting delivery models and juggling caregiving with work.

**41%**  
of re-opened organizations  
report concern about hiring and  
rehiring staff.

**King County Nonprofit Cultural Organization**

I think the 2021-22 season will be a weak one for theatres; that we'll see fewer people in the audiences initially, but we will succeed in producing art. I think there will be a bit of a brain drain in the short term, as some theatre makers choose not to come back. I think we will have a recovery, but it will take several years.



**King County Nonprofit Cultural Organization**

Recovery for post-pandemic WA State cultural sector is going back to BETTER, not going back to normal. Before the pandemic, our funding systems, ability to meet the diverse needs of our constituents (accessibility, etc.), were all severely hampered by the lack of funding available in our sector. Non Profits arts routinely pays employees much less than in almost any other industry. Many employees have left for other sectors as a result. Continuing advocacy at the government levels for increased funding for the arts in non-COVID situations is vital for ensuring that we can maintain the workforce necessary to produce amazing art.





**Exhibit 17**  
Proportion of organizations naming hiring/  
rehiring staff as a top 3 challenge by  
organizational open status

All Reporting Organizations	17%
Yes, with limited capacity	19%
No, and please estimate your organiza- tion's earliest reopen date	12%
Yes, at full capacity	22%
No, this question does not apply to my organization	0%

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

What is also not immediately evident in the financial data is the massive impact that the loss of volunteers has had on some organizations. Across the 121 reporting organizations who provided budget histories, there was a decline in volunteers of over 8,000 individuals (17% of their pre-pandemic volunteer base). Older adults and retirees comprised some of the most dedicated and reliable volunteers in pre-pandemic times, and happened to be some of the most vulnerable to the effects of COVID. Other volunteers simply found home life, school, work and/or remote work in the pandemic age simply too much to handle and

**Exhibit 18**  
Proportion of organizations naming hiring/  
rehiring staff as a top 3 challenge by  
organizational size

Less than \$50k	2%
Between \$50k and \$250k	13%
Between \$250k and \$500k	18%
Between \$500k and \$1m	8%
Over \$5m	43%

shed their volunteer commitments, including board service. Even as the vaccine rolled out, anecdotally, the risk calculation for volunteering continued to favor staying away from previous volunteer commitments. Depending on the role of the volunteers, for some organizations this meant more work fell to remaining staff, which was a cause of additional stress. Of course, organizations vary greatly in terms of their reliance on volunteers. Those who did rely on volunteers were not able to fully take advantage of relief such as the PPP, which required demonstrating a financial loss.

**KEY FINDING:** Forty-one percent (41%) of organizations furloughed staff or reduced hours and/or pay across the organization; 6% believe these changes to be permanent.

See Case Study: [Spark Central](#) and [Tasveer](#)

# 4.7. SHIFTS TO VIRTUAL AND DIGITAL PROGRAMMING

By far, the shift from in-person to virtual operations, both internally and for programming, was the most common change triggered by the pandemic. It also appears to be a change that is largely here to stay. A majority (81%) of stuorganizations reported establishing or expanding remote work (Exhibit 19). Of those, 65% believe it is a permanent change. Additionally, 70% reported offering significantly more digital programming. Of those, 74% believe it is a permanent change. Larger organizations were more likely than smaller organizations to report these shifts and more likely to report that they would likely be permanent. Smaller organizations may already have been operating without a physical location. It may also be that smaller organizations do not anticipate having the resources to operate hybrid or dual modalities in the future.

Organizations in North West Washington were the most likely to report that these changes were permanent. Organizations in South West and Eastern Washington were both the least likely to report making these changes and the least likely to believe that these changes would be permanent. These patterns may in part reflect geographic differences in relative risk tolerances for attending in-person events and participant preferences for engaging with programming. Variation in statewide broadband access is another potential factor in geographic differences related to the sustainability of virtual programming and operations. BIPOC-identifying organizations were the most likely to report shifts to remote work and digital programming. They were also more likely to report that they expected remote work to be a permanent shift for their organization.

*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



Exhibit 19  
Shifts to Remote Work and Digital Programming in Response to the Pandemic

	Establish or expand remote work	Offer significantly more digital programming
Across All Reporting Organizations	81%	70%
Less than \$50k	64%	70%
Between \$50k and \$250k	85%	85%
Between \$250k and \$500k	94%	88%
Between \$500k and \$1m	100%	100%
Over \$5m	100%	93%
King	89%	85%
Central Puget Sound	87%	83%
Eastern Washington	52%	57%
North West Washington	93%	86%
South West Washington	50%	60%
None of the above	80%	75%
Any W identity	90%	94%

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

While overall participation in arts and cultural activities has declined drastically, over one-third of organizations also reported seeing more cultural participation from outside their county through virtual programming (Exhibit 20). Greater geographic reach and inclusivity for participants who have transportation challenges or other barriers to leaving home were commonly noted silver linings from the

shift to greater virtual programming. However, if this shift is indeed permanent, it also means a significant change in the competitive landscape for cultural participant spending if participants can continue to access programming from across the nation and around the world. Washington State cultural organizations will grapple with what it means to be both global and local in a hybrid future.

Exhibit 20  
Changes to Earned and Contributed Income from Outside Your County since March 2020

	Number	Percent
Increased	63	38%
Stayed the same	36	22%
Decreased	33	20%
I don't know	35	21%

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

More than half of the cultural programs chosen by participants for engagement since March 2020 have originated outside Washington State (Exhibit 21). About 48% were from within Washington. Almost one-third were from locations outside Washington but within the US. Only 16% sourced content from an international location.

King County Nonprofit Cultural Organization

The biggest change after switching all of our events to online – and the easiest to track – was the increase in long-distance viewers of our events. Before March 2020, only about 3% of our ticket buyers were from out-of-state. Since March 2020, 18% of our ticket buyers are from outside of Washington. We’ve also seen an increase in ticket buyers from outside the Puget Sound region.



*Having access to programming outside of the area in which I live has been really wonderful. I hope organizations are able to keep it up once things have safely reopened.*

King County Cultural Participant



See Case Study:  
**Spark Central, Tasveer,  
and TeenTix**

**Exhibit 21**  
**Responses to *Of the cultural programs you participated in since March 2020, please estimate the approximate percentage of where those programs were produced.***

	Cultural Participant
Inside Washington State	48%
USA, outside of Washington State	31%
Outside of USA	16%
I don't know	5%

Source: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

Cultural participants expect to continue to engage in virtual participation even as organizations open for in-person cultural programs. Nearly half of cultural participant respondents (47%) indicated an intention to continue virtual participation. However, 18% of cultural participants preferred to continue to only engage remotely for the foreseeable future regardless of the availability of in-person programs.

The move to digital programming has been associated with increased accessibility for certain participants, such as those with a physical disability or impairment and those with barriers to transportation. Several organizations reported that their online cultural participation was often younger and more

racially and geographically diverse than their pre-pandemic audience. Others noted that there were participants who preferred the online format for engagement. However, the shift has also highlighted the impact of the digital divide in access to the arts, along with many other community resources. Anecdotally, communities that lack reliable and affordable internet access, devices, and technology literacy skills were much more likely to be isolated from the cultural offerings of the past two years. This included many rural areas, low-income adults and youth, some BIPOC communities, and older adults with low technology literacy.

**47%**

of cultural participants indicated an intention to continue virtual participation.

**18%**

of cultural participants preferred to continue to engage remotely-only for the foreseeable future, regardless of availability of in-person programs.

**KEY FINDING:** Seventy percent (70%) of organizations reported offering significantly more digital programming. Of those, 74% believe it is a permanent change.



#### Yakima County Nonprofit Cultural Organization

Participants in online/virtual offerings have been overwhelmingly white and privileged. Internet access is poor out here, and most of the BIPOC community we serve cannot or does not want to take advantage of our virtual programming - even with translation services.

#### King County Nonprofit Cultural Organization

At the very start of the pandemic we shifted to digital programming. A majority of the individuals PwA serves have compromised health and we quickly realized we needed to keep our community safe and also engaged. Isolation can have devastating mental consequences. Many of our participants did not have digital access. Immediately, we distributed tablets and provided tech training to our participants and shifted classes online. An unexpected outcome was that some participants felt more comfortable learning online! We are eager to return to in person learning, but will now always include a digital component.

## 4.8. NEW LENS ON ACCESSIBILITY

Participants shifted as the mode of content delivery shifted, creating new challenges and opportunities related to delivering accessibility for all participants. The online modality seemed to immediately be much more accessible and equitable for participants with mobility impairments, for example.

Meeting the needs and gaining the interests of other communities, such as those who are blind or visually impaired, deaf, deaf-blind, or deaf-disabled required more significant creative adaptation. Organizations that had a pre-pandemic focus on accessibility led the charge in adapting programming, as described in the spotlight as early as March 2020.

Across surveyed organizations, nearly one-third made accessibility improvements, and another 22% said they plan to; 84% of those making the shift intend to make it permanent. Accessibility was clearly perceived among respondents as an area for continued investment and learning. Moving toward equity in this realm requires investment and manifold considerations, such as captioning, transcription, interpretation, live or recorded audio description, Braille, sighted guide training, tactile images, program marketing, venue accessibility, and representation.

It requires that all involved staff and artists understand their audience members with disabilities. Considerations of equity in accessibility should also span the entire artistic endeavor, from program design through execution. As the cultural sector moves into its post-pandemic future, it will be crucial to weigh whose needs are met and whose are left behind in the “new normal.”

*The additional opportunity for education and personal growth through online programming during the pandemic has been so valuable. I've attended conferences and seen speakers and performances I never would have been able to travel to see in person. As a person with disabilities, it has been particularly rewarding to have more arts at my fingertips.*

Yakima County  
Cultural Participant

**KEY FINDING:** Across surveyed organizations, nearly one-third had made accessibility improvements, and another 22% said they plan to. Eighty-four percent (84%) of those making the shift intend to make it permanent

## SPOTLIGHT

### Dandylyon Drama

**Mission:** Dandylyon Drama’s mission is to grow more creative, compassionate, and courageous people through quality and accessible performing arts education.

Dandylyon Drama reaches young people of all abilities, providing them with quality arts experiences. Through their Creative Adaptive Performance Ensemble program, they foster a community of young performers with disabilities who create and perform their own stories.

***We have reached our families who have students with disabilities who have thrived with the online class/club environment. This Creative Adaptive Performance Ensemble has been a mainstay since March 2020.***

### Deaf Spotlight

**Mission:** Deaf Spotlight inspires and showcases Deaf Culture and Sign Languages through the arts.

Deaf Spotlight supports creative content about, for, and by Deaf, DeafBlind, DeafDisabled, and Hard of Hearing communities. Their programming includes exhibitions, workshops, support groups, happy hours, creative arts camp for youth, the Seattle Deaf Film Festival, and Deaf Spotlight presents—a theatrical program featuring works written by Deaf playwrights and brought to the stage by Deaf directors and cast.

***We were able to hire a full-time staff: Executive Director and expand marketing/communications/access team to provide online and accessible content. We launched the new BIPOC Deaf Arts Grant program to support BIPOC Deaf, DeafBlind, DeafDisabled and Hard of Hearing artists and their careers.***

### Jack Straw Cultural Center

**Mission:** Keeping art, culture, and heritage vital through sound.

Jack Straw is a community-based resource that provides a production facility for local artists who work creatively with sound. Jack Straw provides a number of access programs including education for youth with a broad range of disabilities like the Blind Youth Audio Project, Accessible New Media Gallery Workshops, and the Lowell Elementary Special Education Workshops.

***[Jack Straw] did two sets of programs working with 3 three classes of medically fragile kids, most at home, some in class. We designed a new poetry-based music, sound, and movement project for them, trying to figure out and adapt to a great array of necessary accommodations. We also did audio described versions of their final videos for them.”***

## 4.9. CENTERING THE EXPERIENCES OF BLACK, INDIGENOUS, AND OTHER PEOPLE OF COLOR

COVID is only part of the full impact that 2020 had on society. Several high-profile murders also ignited a renewed acknowledgment that generations of systemic discrimination against Black people continue to harm all of our communities. This discrimination, and the resulting resource disparities, only exasperated the effects of COVID in Black, Indigenous, and other communities of Color (BIPOC).

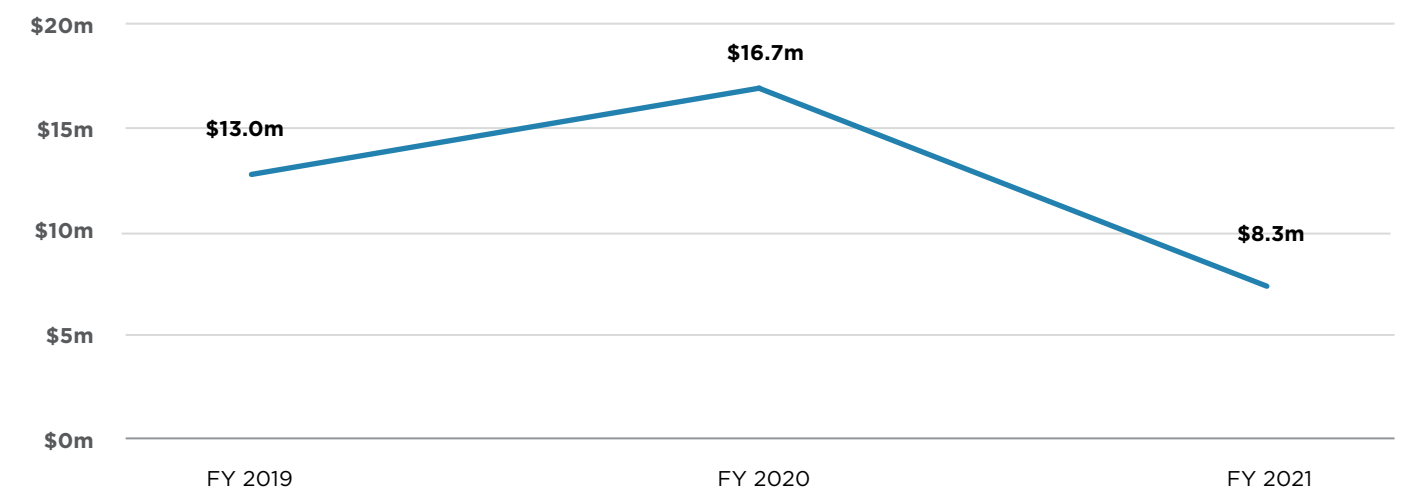
Most BIPOC-identifying organizations already had missions and long track records of centering the experiences of BIPOC communities. Despite this strong foundation in equity work, they were also more likely than non-BIPOC organizations to report “Engag[ing] in new equity/anti-racism work” and more likely to report “Prioritiz[ing] centering more BIPOC (Black, Indigenous, People of Color) voices” during the pandemic. This highlights how equity and anti-racism

work is a continuous effort, no matter the starting place. Having a community of focus was a central point for BIPOC-identifying organizations around which they could pivot their offerings. They were able to take a holistic view of needs that was not limited to a specific discipline.

BIPOC-identifying organizations also experienced significantly increased attention and funding in response to the events of 2020. The median BIPOC-identifying organization saw a 147% increase in contributed revenues between FY 2019 and 2020, funds that could significantly impact small organizations. As a group they saw 29% increases in contributed revenue. Despite declines in earned revenue and higher than average audience losses, many BIPOC organizations ended the 2020 fiscal year with higher revenues than the previous year. However, the data shows us that

### Exhibit 22

#### Total Contributed Revenue Among BIPOC-identifying organizations



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



# SPOTLIGHT

## United Indians of All Tribes Foundation

**Mission:** To provide educational, cultural and social services that reconnect Indigenous people in the Puget Sound region to their heritage by strengthening their sense of belonging and significance as Native people.

Since 1970 United Indians of All Tribes Foundation has been serving urban Natives in Western Washington through culturally responsive services and programming. The wide range of social services support children, families, and elders through education, employment, and housing. Headquartered in the Daybreak Star Indian Cultural Center, UIATF features work by contemporary Native artists in the Sacred Circle Gallery.

*As an Indigenous organization, we take a holistic view of the arts and include all of the separate disciplines into our art programming...When the pandemic first hit, we were in the process of expanding outlets for Indigenous artists through our Sacred Circle Arts and Gifts...We created an online store and worked hard on marketing efforts so that the artists we represent could sustain themselves through their work...We learned to use livestream as a substitute for our Indigenous Peoples' Day celebration and realized that we could extend our reach, as this event has been viewed by 37,000 members of our community--a clear illustration of the need for cultural programming. As a follow-on, we created a series of livestream sessions with talks by Indigenous activists, language keepers, politicians, healers, and artists with a viewership of 5,000.*

## Asia Pacific Cultural Center

**Mission:** To bridge communities and generations through art, culture, education, and business.

Asia Pacific Cultural Center represents 47 countries and cultures. Cultural programming includes: workshops, Taste of Asia and Asian Tea Experience classes, language classes, field trips, annual cultural festivals and celebrations, and the Asia Pacific Art Gallery. Through the Promised Leaders of Tomorrow (PLOT) Youth Program, APCC engages API youth across Pierce County.

*We have lost in-person activities. We have lost income from our space rental. However, we have reached more audiences/participants through virtual programs. Not only nationwide, but worldwide...We have been serving our Asian Pacific Islander Community during the pandemic and still...in a cultural and language specific way. They reach out to us because they trust us. [They will not be helped without support that looks like them], speaks their language, and that will go the extra mile to help them... We need ways to get participants back to normal attendance. We need funds to pay staff to do this hard work.*

for BIPOC-identifying organizations FY 2021 contributed revenues are lower than their FY 2019 baseline, dropping by 50% between FY 2020 and FY 2021. As demonstrated by the figures for FY 2021 and the disparities around access to relief funding, there is concern that funder and individual giving priorities will shift, and these dollars will not persist.

Organizations that did not identify as BIPOC also reported high rates of work in anti-racism (66%) and efforts to center BIPOC voices (67%) (Exhibit 23). Some found opportunity to galvanize or accelerate existing internal and external work on anti-racism. For others, the

experiences of 2020 were an initial wake-up call that their institutions had an imperative to address long-standing narratives of inequality. Organizations, BIPOC and non-BIPOC-identifying, overwhelmingly indicated that centering BIPOC voices and anti-racism will be permanent changes coming out of the pandemic. More than half (56%) of organizations reported prioritizing centering more BIPOC voices and of those, 95% will make it permanent. And 58% of organizations reported engaging in new equity/anti-racism work and of those, 92% will make it permanent.

## Exhibit 23

### Centering BIPOC Voices and Equity/Anti-Racism Work in Response to the Pandemic

	Prioritize centering more BIPOC (Black, Indigenous, People of Color) voices	Engage in new equity/anti-racism work
Across All Reporting Organizations	56%	58%
Less than \$50k	56%	54%
Between \$50k and \$250k	74%	66%
Between \$250k and \$500k	88%	88%
Between \$500k and \$1m	77%	85%
Over \$5m	93%	79%
King	76%	74%
Central Puget Sound	76%	73%
Eastern Washington	48%	33%
North West Washington	79%	71%
South West Washington	60%	60%
None of the above	67%	66%
Any BIPOC identity	90%	76%

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



BIPOC-identifying organizations collectively experienced a

**29%**

increase in contributed revenue in the first year, however a

**50%**

decrease is projected by FY 21.

**KEY FINDING:** Across all respondents, over half reported either a shift to prioritize centering more BIPOC (Black, Indigenous, People of Color) voices or engaging in new equity/anti-racism work.

See Case Study: **LANGSTON**

## 4.10. READINESS TO REOPEN AND RETURN

Washington State was declared “fully open” on June 30, 2021, but soon after, the Delta variant caused a late summer surge in cases. Organizations completed surveys between July and September 2021. Given the rapidly evolving risks associated with COVID during this period, the reliability of stated re-opening dates are unclear. The Delta variant emerged in force in July 2021 in Washington State, creating a fourth wave of COVID infections. This wave peaked in August and was on the decline in September, all during the survey period. As it became clear that mass vaccination would not eliminate the threat of infection, the COVID narrative shifted in the fall to grapple with the likely long term and endemic nature of this virus.

The context of this wave is clearly enmeshed in organizations’ outlook for re-opening and

the return of participants. Responses earlier in the summer focused on getting high rates of vaccination across the state. By early fall, they were acknowledging a slower return that they initially hoped.

At the time of their response, 53% of organizations were open with limited capacity, 20% were open at full capacity, and 26% had not re-opened yet (Exhibit 24). Estimated earliest re-opening dates for those that had not re-opened typically ranged from in the fall of 2021 to January 2022.

Organizations reporting from South West Washington were the most likely to have re-opened with 90% reporting at least limited capacity, while North West Washington was the least likely at 64%.

### King County Nonprofit Cultural Organization

We need to be able to stay open to create momentum. Getting as many people vaccinated as possible, as expeditiously as possible, will be critical to reigniting our economy and tourism. Optimism, paired with an engaged and empowered community can transform an outcome for our shared future.

### King County Nonprofit Cultural Organization

Given the proliferation of the Delta variant, and the effect it’s having on both safety protocols and consumer confidence, recovery is clearly a more drawn out process than we thought in the early summer of 2021. Federal and other relief funds are critical to keeping arts and culture sector employees working, but these funds cannot sustain us if audiences are not yet ready to return to in-person performances and events. Post-pandemic, hopes are high that audiences will return in great numbers and with great enthusiasm to the arts and culture experiences they’ve been without since March of 2020.





Exhibit 24  
Nonprofit Organizational Survey Respondents by Opening Status

	Number	Percent
Yes, with limited capacity	111	53%
No, and please estimate your organization's earliest reopen date	54	26%
Yes, at full capacity	37	18%
No, this question does not apply to my organization	8	4%
No response	2	1%

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

Lack of certainty around participants' willingness to return was the top challenge to in-person re-opening cited by all organizations (Exhibit 25). Audiences and participants are central to organizations' cash flow and financial sustainability. The past year has seen an incredible influx of relief and increased generosity from public and private funders, but organizations believe that this level of support cannot be expected into the future. Survey data presented in Section 6.1 Future Outlook indicates a downward trend in contributed

revenue starting in 2021, well before signs of recovery in earned revenue. Maintaining engagement with participants, and in some cases, growing audiences and participants via digital programming were the top priority for cultural organizations. Most chose to forego earned revenue during this time if they could at all afford it in favor of maintaining audience and participants' connections. For example, only 8% increased ticket pricing, while 30% moved to a sliding scale or pay what you can model.

Exhibit 25  
Responses to Top 3 Challenges Associated with Returning to In-Person Programming

	Number	Percent
Lack of certainty around participants' willingness to return	111	54%
Assuring participant compliance with public health requirements	78	38%
Health and safety of workforce	73	36%
Cash flow	74	36%
Providing a mix of digital and in-person programming	70	34%
Reengaging former participants	63	31%
Hiring/rehiring staff	35	17%
Mounting or developing new programming	28	14%
Sector attrition or losing workforce	6	3%
Assuring staff comfort and compliance with public health requirements	0	0%

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

The perspective on challenges seems to vary by whether an organization has already opened (Exhibit 26). Those that have already opened at full capacity are more likely to report concern about re-engaging former participants, for example. They are also most likely to report

hiring/rehiring staff as a challenge. Those that have re-opened are also less likely to report concern about public health compliance, and health and safety of workforce, which were top concerns for those that had not yet opened.



Exhibit 26

Responses to Top 3 Challenges Associated with Returning to In-Person Programming by Opening Status

	Yes, at full capacity	Yes, with limited capacity	No	No, does not apply to my organization
Lack of certainty around participants' willingness to return	47%	56%	57%	38%
Assuring participant compliance with public health requirements	36%	32%	51%	50%
Health and safety of workforce	36%	32%	47%	13%
Cash flow	31%	42%	27%	38%
Providing a mix of digital and in-person programming	17%	43%	29%	25%
Reengaging former participants	42%	31%	24%	25%
Hiring/rehiring staff	22%	19%	12%	0%
Mounting or developing new programming	14%	12%	18%	13%
Sector attrition or losing workforce	3%	5%	0%	0%
Assuring staff comfort and compliance with public health requirements	0%	0%	0%	0%

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

Re-opening concerns also varied by organization size. Notably, very large organizations listed the health and safety of their workforce as the number one concern by far (Exhibit 27). They were also the most likely to be concerned about providing a mix of programming and hiring/rehiring staff. While they do cite uncertainty about participants' willingness to return, none of them had concerns about re-engaging former participants.

Concerns about cash flow followed a clear pattern according to size, with very small organizations ranking as the most concerned and large to very large organizations ranking as the least concerned. This may be linked to the availability and scale of pandemic relief funding. Major funding sources like the PPP were more available to larger organizations and may have granted a relative degree of flexibility.

Exhibit 27

Responses to Top 3 Challenges Associated with Returning to In-Person Programming by Organization Size

	Less than \$50k	Between \$50k and \$250k	Between \$250k and \$500k	Between \$500k and \$1m	Over \$5m
Lack of certainty around participants' willingness to return	62%	49%	65%	54%	43%
Assuring participant compliance with public health requirements	54%	40%	18%	46%	14%
Health and safety of workforce	24%	34%	29%	38%	71%
Cash flow	38%	34%	24%	15%	21%
Providing a mix of digital and in-person programming	24%	40%	29%	54%	43%
Reengaging former participants	42%	40%	18%	46%	0%
Hiring/rehiring staff	2%	13%	18%	8%	43%
Mounting or developing new programming	14%	6%	24%	23%	14%
Sector attrition or losing workforce	0%	9%	0%	0%	0%
Assuring staff comfort and compliance with public health requirements	0%	0%	0%	0%	0%

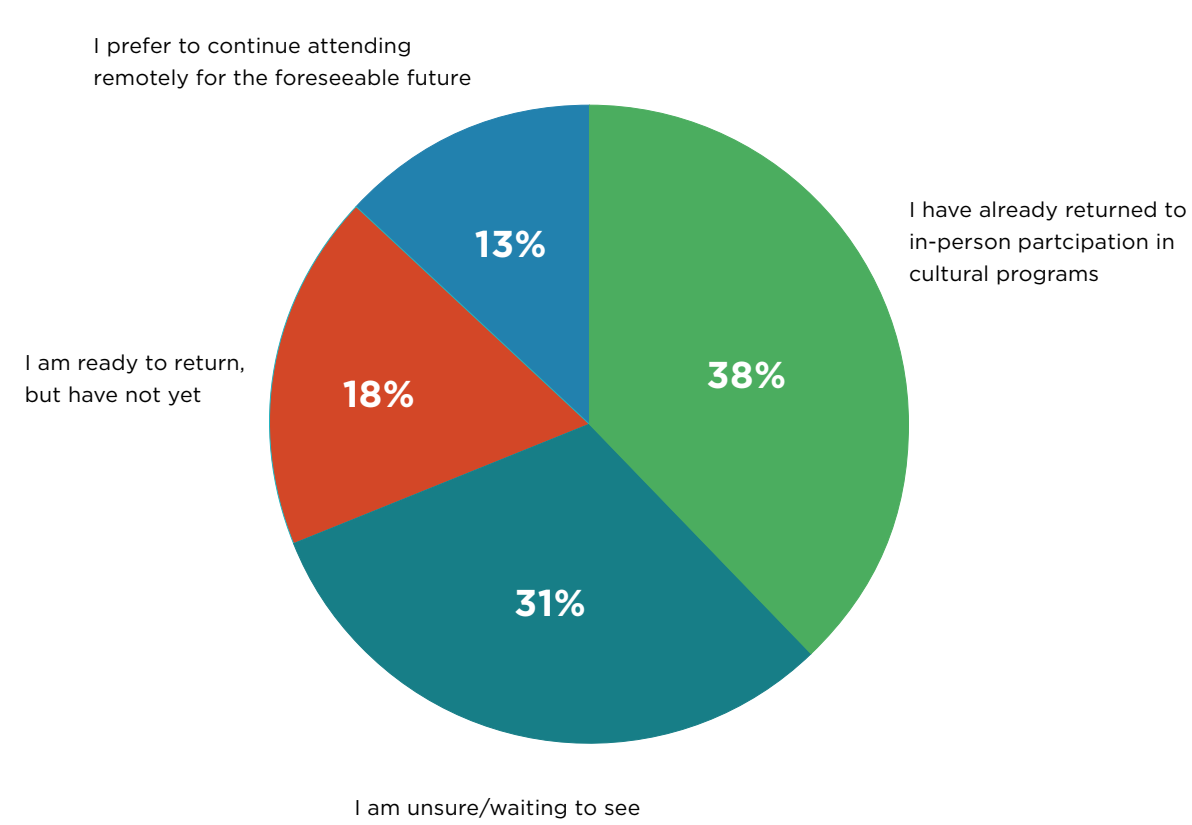
Source: ArtsFund CCIS Non-profit Organizational Survey, 2021; BERK, 2021.

Cultural participant data reflects a mix of perspectives. The vast majority (93%) of cultural participant respondents reported being fully vaccinated. However, while some participants (38%) indicated they have already returned to in-

person engagement, most reported holding off at the time of the survey (Exhibit 28). One third have adopted a wait-and-see attitude and only 13% say they will continue attending events/ programs remotely for the foreseeable future.



**Exhibit 28**  
Responses to *How do you feel about returning to in-person participation to cultural programs?*



Source: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

Survey data shows that cultural organizations might expect up to two-thirds of their cultural participant participation to return by the Spring of 2022 (Exhibit 29), including the 38% who have already returned. However, many organizations said they planned to re-open

by early 2022, indicating that there may be a lag between re-opening and filling spaces and venues. Organizations are investing in re-opening plans and assuming significant risk associated with the time it will take for participants to return.

**Exhibit 29**  
Responses to *When is the earliest you plan to participate in in-person cultural programming?*

	Percent of Cultural Participants
Summer 2021	5%
Fall 2021	24%
Winter 2021	15%
Spring 2022	19%
Summer 2022	3%
I don't know	34%

Source: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

It is difficult to pinpoint the reasons that potential participants remain on the fence about attending in-person cultural programming. A survey question asking to rate the importance of various decision factors revealed no clear top reasons, underscoring the complexity of decision-making in this time (Exhibit 30). A few, but certainly not all factors are within cultural organizations' control. Notably, for existing cultural participants, the affordability of tickets and admission pricing was the least important factor.

*[Arts and culture] have been so critical to starting to feel "normal" again. Even though it might not be categorized this way, I feel that art and cultural programming are "essential" for life*

Snohomish County Cultural Participant







**Exhibit 30**  
Responses to *Please rate the following factors in your decision whether to participate in a cultural program in-person when available.*

	Cultural participant Ranking
Organization's mask and safety policies	1
My own vaccination status	2
Vaccination status of those in my party	3
Organization's vaccine policy	4
Infection rates in my community	5
Vaccination rates in my community	6
Phase/State recommendation CDC guidance	7
Content/performers of the program	8
My ability to safely distance within the space (indoor or outdoor)	9
Size and scale of program (in terms of number of attendees)	10
Physical location of program (indoor or outdoor)	11
Organization's refund and cancellation policy	12
Physical location of program (proximity to home or work)	13
Affordability of ticket/admission pricing	14

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



Further, while up to two-thirds of cultural participants may return to some level of in-person programming over the next year, their expectations for total spending appear to be much lower than prior to the pandemic. Cultural participants are expecting to spend about half of what they spent prior to the pandemic on cultural participation. This might indicate a lower anticipated frequency of participation, whether due to fewer available programs or household budget constraints.

As cultural participants' decision-making to attend in-person activities remains complex and highly dependent on deciding factors which are out of the organizations control, their willingness to return is one of the greatest concerns for cultural organizations. The lack of certainty around welcoming back participants in-person leaves cultural organizations in a wait-and-see pattern, with the long-term sustainability of the organization unclear.

Cultural participants are expecting to spend about

**50% less**

of what they spent prior to the pandemic on cultural participation.

---

**KEY FINDING:** Over 70% of organizations that were open at some level of capacity responded that 'Lack of certainty around participants' willingness to return was their primary challenge to reopening.

---

See Case Study:  
**Spark Central** and **TeenTix**



## 5. CASE STUDIES

# CASE STUDIES

The CCIS includes five case studies from a range of organizations that illustrate the nuance behind the numbers of the pandemic experience. The case studies represent experiences that tie into themes around shifts to and focus on organizational mission, expansion of program delivery, connection with broader audiences, service to youth, re-opening, and the toll on workforce and volunteers. The Advisory Committee informed selection of these organizations from the pool of Nonprofit Organizational Survey respondents who submitted a story about a challenge or pivot they made in response to the pandemic. Selections were made to include different perspectives based on geography, the organizations' BIPOC identity, discipline, and the scale of the organization. Interviews with representatives from each organization were conducted in October and November 2021.

## 5.1. LANGSTON

**County:** King  
**Discipline:** Multidisciplinary  
**Budget Size:** between \$250k and \$500k

LANGSTON, as an arts organization, is just six years old, but it is also the manifestation of a nearly fifty-year-old legacy that is inseparable from the Black culture of the greater Seattle area, and in particular the Central District where the Langston Hughes Performing Arts Institute is situated. The building was programmed by the City of Seattle from 1972 until 2015 when LANGSTON was founded to steward this legacy and cultivate Black brilliance through the arts. Myriad films, performances, talks and lectures, and workshops for young and old have graced its stage and halls throughout the years. All of which came to a halt when the pandemic struck.

Amidst the shifts in public health guidance, their mission “to strengthen and advance our community through Black arts and culture” provided all the guidance their staff of three needed. Asking the question, “what does the Black community need in this time?” led them to redeploy their resources in previously unimagined ways.

One seed of inspiration was a group of Seattle artists, Ijeoma Oluo, Ebony Arunga, and Gabriel Teodros, sharing a GoFundMe in March 2020 for artists who were losing gigs in early March. Many artists and cultural workers were unable to qualify for unemployment. They had been juggling gigs and contracts with 10-15 employers working more than full-time hours, only to see that effort not recognized

by the state. LANGSTON connected with this group of artists and brought the staff and administrative capacity to scale this message and the call to action. While they had never been a funder or distributor of grant funding in their organizational history, it was clear that this was what the Black community needed in this moment. By the end of the effort in the Spring of 2021, they raised and distributed over \$1.1 million dollars to over 2,100 individual Washington artists, becoming the state’s largest funder of individual artists during the pandemic. This amounted to over four times the organization’s own operating budget, creating something massive out of almost nothing but creativity and determination. For all that there is to celebrate about the trajectory of the Seattle Artists Relief Fund, we cannot deny the injustice that created the need in the first place. Individual artists, so many of them BIPOC, have been long been under-supported by our social safety nets. As a result of this experience, LANGSTON continues to work in support of individual artists, with a refreshed focus on Seattle area Black artists.

A second spark came from the move to digital programming. As many producing organizations found, there were some types of content and formats that simply didn’t work without the in-person aspect. As frustrating as the shift was, there were undeniable benefits, enough so that LANGSTON plans to continue to offer hybrid and digital opportunities. For example, the building was built before accessibility was universally considered in construction. It never fully serves those with physical disabilities, and the virtual offerings helped to bridge that gap. Like many others, they were able to access higher profile artists and filmmakers to participate in programs “where we’d never get a call back before.”







To be honest we are still in crisis mode  
- I think we've just gotten used to it.

**Tim Lennon**  
*Executive Director of LANGSTON*

However, most crucial to the mission was how the pandemic forced a reckoning with the fact that LANGSTON is based in a hundred-year-old building in the Central District, anchored in place, while gentrification has forced a diaspora of its audience and clients to South King County, Pierce County and elsewhere in the region. It had become almost impossible for Black people, some who recall playing in the building as children and teenagers in the 70s, 80s, and 90s to come enjoy a show. The digital offerings created a way to reconnect with this audience and the participation in the chats were peppered with reminiscences and greetings as if they had never left. After years, maybe decades, apart, here on the screen was a key part of the core legacy that LANGSTON existed to steward. They would not go back to in-person only programming.

As a Black led, Black serving organization, the experience of the 2020 Black Lives Matter (BLM) movement and funding and attention from new corners could be disorienting and,

in the end was fraught with irony. LANGSTON appears to be financially in better shape than ever, thanks to 2020 funds prioritizing BIPOC organizations. Their experience is common among many small BIPOC organizations and businesses who saw funds pour in. However, as the dust from the stampede to put out statements in support of BLM and make donations cleared, BIPOC organizations were left looking for signs of structural and meaningful change. By the time of this writing, the 2020 money "has dried up," and the funding landscape looks to be largely the same. Tim shared a sense of irony in that they no longer qualify for grants targeted to small organizations due to the boost in their 2020 financials.

The near-term situation looks challenging for LANGSTON and many other cultural

organizations. They are not back to filling the halls with performers and audiences; and hearing the laughter of children in the space between workshops, but they have also exhausted their resources to get to this point. Staff are exhausted and the moment for relief funding seems to have passed. What now?

Seeds of hope are still there in their mission, the Black community, and solidarity with other sectors and communities. For LANGSTON, culture will persist, if only because it is essential to Black survival.

Artists feed off the energy of their audiences. Audiences get way more out of the live event experience versus a live feed of a live event.

It's just kind of lonely to be in a room that seats 300 with a camera person, maybe a web person.

**Tim Lennon**  
*Executive Director of LANGSTON*





# 5.2. SEATTLE ART MUSEUM

**County:** King

**Discipline:** Visual Arts

**Budget Size:** More than \$5m

Thursday, March 12, 2020 began like almost any other day in the life of the Seattle Art Museum's (SAM), CFO, Cindy Bolton. She volunteered that morning at the Spring Fund Drive for another Seattle cultural organization, KEXP, answering phones and catching up with colleagues in the sector. By 10 that morning, she was hearing concerns from front-line staff at the museum about the mysterious respiratory virus that had begun cropping up in Seattle. By that afternoon, after deliberations with the rest of the leadership team, SAM closed its three venues, the downtown Seattle Art Museum, the Seattle Asian Art Museum, and the Olympic Sculpture Park. Like so many other arts and cultural institutions, they acted quickly thinking it would be a matter of weeks, or maybe a month, before things settled down. In fact, this first closure lasted six months. SAM re-opened in September 2020, only to close again in November for three more months as Seattle battled a winter surge in cases. They have been open since mid-February 2021 with limited capacity.

Only a month prior to closing that Thursday, the museum had welcomed over 10,000 visitors over just two days to the Seattle Asian Art Museum Housewarming weekend. The festivities celebrated the completion of a major \$56 million restoration and expansion to its iconic 1933 Art Deco building that would quickly find itself shuttered for a year. Although they were closed to participants, as

a visual arts institution, the fixed costs of the facilities and collections meant that operating expenses could not easily be tightened.

A museum experience is almost inherently an in-person endeavor. Galleries offer the ability to examine art works up close, to experience scale and form the way the creator must have seen it, and to interrogate the process and the context of the art along with other viewers. The experience cannot fully be translated to online modes. On the day the museum closed, films from the Ghana-born and London-based artist John Akomfrah known for his explorations of colonialism, oppression, and environmentalism were poised to screen in the galleries. The films and interactive exhibits would go unseen for nearly the duration of the exhibit. As a result, essential conversations went un-sparked, connections were left un-made, and vital internal questions un-asked.

SAM struggled to shift its arts and cultural content online. They had not previously seriously contemplated moving parts of their experience online, and scrambled to deliver curatorial talks, artist talks, and tours. Their membership and donor community rallied to support the organization as their earned revenue essentially dropped to zero. With the help of PPP funding, they were able to maintain all of their staff through June 2020. SAM also offered hazard pay to the essential staff delivering security, building engineering and maintenance, and essential administrative functions during the initial museum closure.

The fits and starts of re-opening and ramp-ups and downs in capacity took an incredible amount of effort for the organization with roughly 300 staff and three physical locations affected by constantly shifting safety protocols. The Olympic Sculpture Park is a mostly outdoor venue. As data showed that COVID was unlikely to be transmitted outdoors with proper social distancing, the

SAM had a long history of equity work and at least a decade of integrating and centering it in the strategic plan... Black Lives Matter and the George Floyd murder sort of lit the ignition on it.

**Mikhael Mei Williams**  
Chief Marketing Officer at SAM

Park was able to remain open to the public. For the indoor venues, however, gearing museum capacity to a new level took roughly four weeks of advance planning in staff protocols, engineering, and climate control. New signage and communications materials had to be made with every change in policy. And through it all, the focus was on meeting the pent-up demand for visual art in the community, staying relevant to its audience, and doing so safely. As an example, SAM opened the Asian Art Museum at an operating loss, staffing the facility up when they could only let in five visitors every 15 minutes.

The cultural flashpoints of 2020 lent new intensity to SAM's equity journey. Equity work got elevated to a Taskforce that included Board members, community members, and cross-departmental staff and Priya Frank was promoted to a new role as Director of Equity, Diversity, and Inclusion. Frank's scope spans the breadth of the museum including human resources, curatorial, development, and communications. Today, SAM is pursuing

equity in mundane decisions, such as choosing bookkeepers, to those most profound and fundamental to museums, such as the definition of American Art via a two-year long project to re-install their collection of over 2,500 American works.

In a sense, SAM kept going throughout the pandemic simply because it is their mission to Connect Art to Life. Whatever level of operation they could safely provide in their three venues to continue that connection, that was the level of capacity they would operate at, at times taking a financial loss to do so. There is an incredible amount of fatigue at this point, but despite it all, optimism too. Optimism that out of this trial will come a new way of doing business - a way for a museum to also be a community organization and to have different conversations with different people about what art gets collected and displayed and whose stories get to be told. That is the vision that keeps SAM staff going.







We're exhausted. We are exhausted and still trying to meet our public service mission. We have lots of great ideas, but it's still not clear what the sustainable revenue or resources are going to be...It still feels like unknowns are out there that will tip the scale. I know SAM will be here for generations to come. Whatever happens, we'll be an important and hopefully resonant part of that future.

**Cindy Bolton**  
Chief Financial Officer at SAM

## 5.3. SPARK CENTRAL

**County:** Spokane

**Discipline:** Arts Service Organization

**Budget Size:** between \$50k and \$250k

Spark Central was founded in 2016 with the focus on igniting the creativity, innovation, and imagination necessary for people to forge the path to their best future. They worked steadily over the next three years to grow membership, programs, volunteer base, and participation from the youth in the West Central Spokane neighborhood where they are located, where about one-third of the neighborhood lives in poverty. By 2019, their creation station, a donated space in the Kendall Yards Development was a place constantly thrumming with energy and creative excitement, whatever the medium. There, participants in the Girls Rock Lab might be working on CD release plans, adults might be workshoping poetry and creative fiction, while middle schoolers might be tinkering with robotics. Volunteers from local colleges and the community were the lifeblood of the organization, providing over 6,000 hours of help maintaining the facility, mentoring youth, and any number of daily tasks to keep the center operating. By 2019, the doors were open five days a week and the computers constantly in use as an average of 73 community members visited the space daily and nearly 5,000 unique members were part of their membership.

Then, in March 2020, everything ground to a halt.

The organization weathered the worst of the pandemic well enough in reflection.

They considered themselves lucky to have had a successful fundraiser in January 2020, celebrating their achievements in growing their community over the last several years. They were able to access relief funds and other contributed revenue as community members pitched in to get them through a tough time. As the world narrowed in focus, Spark Central pivoted along and leaned into their partnership with Spokane Public Schools. They won an Office of Superintendent of Public Instruction (OSPI) grant funded by CARES dollars to support student learning during the pandemic through their Level Up program. Students finish the school day in-person at Spark Central and accessed mentorship and homework help along with creative engagement. The pivot has kept them afloat over the past year.

It is the future that is less certain. The pandemic has eroded some of Spark Central's core assets they worked so hard to grow, namely staff, volunteers, and community. Their highly collaborative team has felt fractured since moving to virtual meetings. Key positions have turned over, some due to financial pressure as Spokane has one of the hottest real estate markets in the country. Their supply of volunteers has dwindled. Older adults and colleges students who make up most of their volunteer base have not been turning out due

We still don't know where they went, our old regulars. Did they move? Are they just staying home? Were they priced out? Because of the pandemic, many families had to move. Phone numbers changed. There was a lot of shifting and we're not seeing our regular faces.

**Brooke Matson**  
Executive Director of Spark Central



to concerns about the health risks, and the competing demands of their own schooling during a pandemic. Even fully remote roles such as the Advisory Board are difficult to fill with volunteers who are screen-fatigued or feeling stretched at home. Staff, making up the difference, are increasingly at risk of burnout. Of most concern is the membership, especially those from low-income West Central. In 2020, staff called down the list of West Central members to check in and they were left with more concerns and questions than answers.

As an arts organization serving youth, they have felt fortunate to be able to access education funding to survive. In comparison, local arts producing organizations seem to have had access to fewer opportunities. While the education work does align with their mission and they hope to continue this level of partnership with the schools, it is certainly not the whole of who they aspire to be. They've also had to put their dreams of another space deeper in the West Central neighborhood on indefinite hold.

Brooke Matson, Spark Central's founding Executive Director, is not holding her breath

for all the members, volunteers, and arts funding to simply "bounce back." There has been a massive cultural shift to staying at home. People are less willing to engage. From where she sits in this moment, it seems that organizations like Spark Central are more likely to "peter out" than "bounce back," without some recognition and intention from the funding environment.

We've had to pivot what we do to survive. Unless there is a flush of arts funding, we'll probably stick with the education vein. I miss the arts programming for adults and the publishing - but I don't see that will happen unless funding comes back.

**Brooke Matson**  
*Executive Director of Spark Central*



## 5.4. TASVEER

**County:** King

**Discipline:** Film/Literary Arts

**Budget Size:** between \$50k and \$250k

In a sense, Tasveer was born for moments such as these. The nonprofit was founded in 2002 in response to the rise in fear, racism, and hate against the South Asian community following the 9/11 attacks. Nearly twenty years later, the COVID pandemic once again showed the foundational cracks in our nation's unity in how quickly sentiment turned on communities of color, and Asian communities in particular. In the years between, Tasveer has grown to become the largest South Asian film festival in the country and a beloved local fixture for greater Seattle film and literature lovers. Despite the growth, their mission to inspire social change through thought-provoking South Asian films, art, and storytelling remained the same and is even more relevant today.

Pre-pandemic, Tasveer's festival would grace local screens such as at the Northwest Film Forum, Seattle International Film Festival's (SIFF) Egyptian Theatre, Film Center, Carco Theater, and the Broadway Performance Hall. In 2019, roughly 3,000 cultural participants enjoyed their film festival. As pandemic health restrictions required theater closures, Tasveer, like so many organizations quickly pivoted to screen their offerings online. Not certain of the duration of closures, they offered



We did - whether we wanted to or not - become a national organization.

**Rita Meher**  
*Executive Director of Tasveer*

their programming for free. The explosion in viewership was incredible. Their 2020 festival garnered 45,000 viewers from across the nation, and even globally.

The shift created a strange paradox that persists today. The incredible national attention and audiences have not translated to a proportional increase in revenue. The entire program still operates via an increasingly exhausted core team of five people working unsustainable hours. Rita Meher, Executive Director, notes that the entire core team has turned over in the last 18 months as employees moved back to India, or work visas not getting renewed on time, and others have simply burned out from the emotional stress and fatigue of the pandemic. The remote environment as blurred lines between work and home life, and Rita found herself on calls and emails 16 hours a day. The shift forced by the pandemic allowed Tasveer to prove that there is a deep market for the content that they produce, but now they haven't the resources and capacity to tap into the opportunity in front of them.

They are working on a path forward. It was clear that offering programming for free was not sustainable for the organization, and more importantly, free content devalues art and the contributions of the filmmakers. The most recent festival in October 2021 used a paywall and geo-blocking to protect artists and still reached 10,000 viewers. Netflix has supported a new fund housed at Tasveer to empower South Asian filmmakers with \$5,000 grants and year-long resources and mentorship access.

Despite the success on the national scale and intention to continue with virtual offerings, Tasveer's roots are local, and they also long for the old days of connecting with their loyal film buffs in Northwest theaters. The digital

pivot has been a struggle for older audience members who have been Tasveer cultural participants for 15+ years. Spaces that were willing to host the festival were scarce this past fall as the pandemic dragged on, and available spaces were in high demand. For a festival dependent on renting venues, space has been a constant challenge over its entire existence, and one that has only grown greater with COVID restrictions.

Tasveer's experience has shown just how meaningless our geographical boundaries can be when it comes to storytelling. Messages transcend borders with ease. In this context, the structure of our traditional means of funding arts and culture, can evolve with the changing ways arts and culture are being delivered. For example, Tasveer is delighting and enriching audiences in California, but not eligible for arts funding from California jurisdictions. Within Washington, the pattern of cities and counties with and without dedicated arts funding have created an uneven landscape of arts and cultural organizations. For Tasveer, an equitable and resilient future for arts and culture in Washington means recognizing that arts anywhere provides benefits everywhere.





## 5.5. TEENTIX

**County:** King

**Discipline:** Arts Service Organization, Multidisciplinary, and Youth Service Organization

**Budget Size:** between \$250k and \$500k

“Finding your thing” is what TeenTix is all about. Developmentally, our teenage years are all about forging new connections with ideas and getting a sense of identity and place in the world around us. Arts and cultural experiences are a crucial part of that process, and yet, much of what is produced is not inherently accessible to youth and young adults. Barriers related to transportation, ticket pricing, and a sense of belonging are often enough to keep teens out. TeenTix provides access by removing barriers, primarily through their Pass Program which offers \$5 tickets to productions at 70 different arts organizations in the Puget Sound region from Everett to Lakewood. They tackle barriers to a sense of belonging with conversations and workshops to teach things like when to clap at the Symphony, while building a community for teens to experience, critique, and talk art together.

Their flagship Pass Program is built upon a network of producing organizations who pay a membership fee. In return, TeenTix works with those partner organizations to promote a welcoming environment and open invitation to events for young people, cultivating future (full price paying) adult audience members. Of course, when there were no productions during the pandemic, there were no tickets to be had by teens or others. TeenTix

immediately waived partner fees in response, but it was the next step that really opened the door to new potential for the organization.

For the first time in their 17-year history, TeenTix began broadening their own teen programming rather than just focusing on access to others’ content. They went straight to the source, the teens themselves, to find out what content and programming would be meaningful to them. At the same time, TeenTix staff drove around to deliver devices to ensure internet connectivity to the available opportunities. Their ongoing programs such as the New Guard and Press Corps also quickly transferred online, but the curriculum loosened to let youth voices and needs drive the content and topics. They wanted to process what was happening with the Seattle protests and Capitol Hill Organization Protest (CHOP). They wanted to engage in and write reviews of art that was happening far outside of Seattle and that was entirely possible as free and low-cost virtual productions from across the country were relatively plentiful. This youth-centered approach was rewarded as TeenTix noticed more regular attendance and engagement from their participants than in the past. In reflection, the pandemic created a unique window to step off the treadmill of business as usual and connect to their customers at a much deeper level.

The organization also continued pre-pandemic plans to launch TeenTix Los Angeles. In one sense, it was not an ideal time to stretch resources to expand to a new city where partners were dealing with their own challenges. In another sense, it has been especially opportune because it came in that moment when they were looking beyond their past models and assumptions to create something that truly reflected the current





I think [presenting organizations] are wondering if they are going to be alive. Will they be able to open their doors? Many haven't gone into their buildings for a while. They just have an extra struggle and layer. It's our priority to be here for them and wait until they are ready. We can plug in then.

**Monique Courcy**  
*Executive Director of TeenTix*

time and youth needs. The future, while in many ways uncertain, will very likely include partnership across TeenTix LA and Seattle, inclusion of arts and youth participants from outside the region, and most importantly – a willingness to keep trying something different because youth and their needs and desires are constantly evolving.

Like many other organizations, PPP was a saving grace, buying time for local funders to start moving funds to bridge the most difficult part of the pandemic. Presenting organization partnerships are slowly coming back online, but their previous level of dependence and exposure to the overall health of the arts ecosystem has been laid bare. And that ecosystem is facing tough questions.



## 6. FUTURE OUTLOOK & OPPORTUNITIES



# FUTURE OUTLOOK AND OPPORTUNITIES

The pandemic has indisputably changed us forever, and many of the longer-term impacts have yet to fully reveal themselves. Though limited, our survey data shows that organizations are far from recovery and running out of options. We used the data to scan the horizon for opportunities and two themes emerged. First, we consider how cultural organizations may continue to evolve over the coming years and the opportunities to support them in that transformation. Second, we look at the role cultural organizations can and will play in our collective social and economic future and wellbeing. It is evident that funders and policymakers also have some critical evolution ahead if they are to keep pace with the needs of the sector and communities.

## 6.1. FUTURE OUTLOOK

A slightly smaller set of organizations (117) were able to provide three years of data, giving us an indication of more recent trends. These organizations are expecting to shrink significantly in size between FY 2020 and FY 2021. The data show a troubling continuation of downward trends, despite the hopes for a bounce back by the end of December 2021. Total revenues across organizations with three years of data declined by 14% between FY 2019 and 2020 and declined again by 26% between FY 2020 and 2021. Earned revenue declined by 42% between FY 2019 and 2020 and again by another 51% between FY 2020 and 2021.

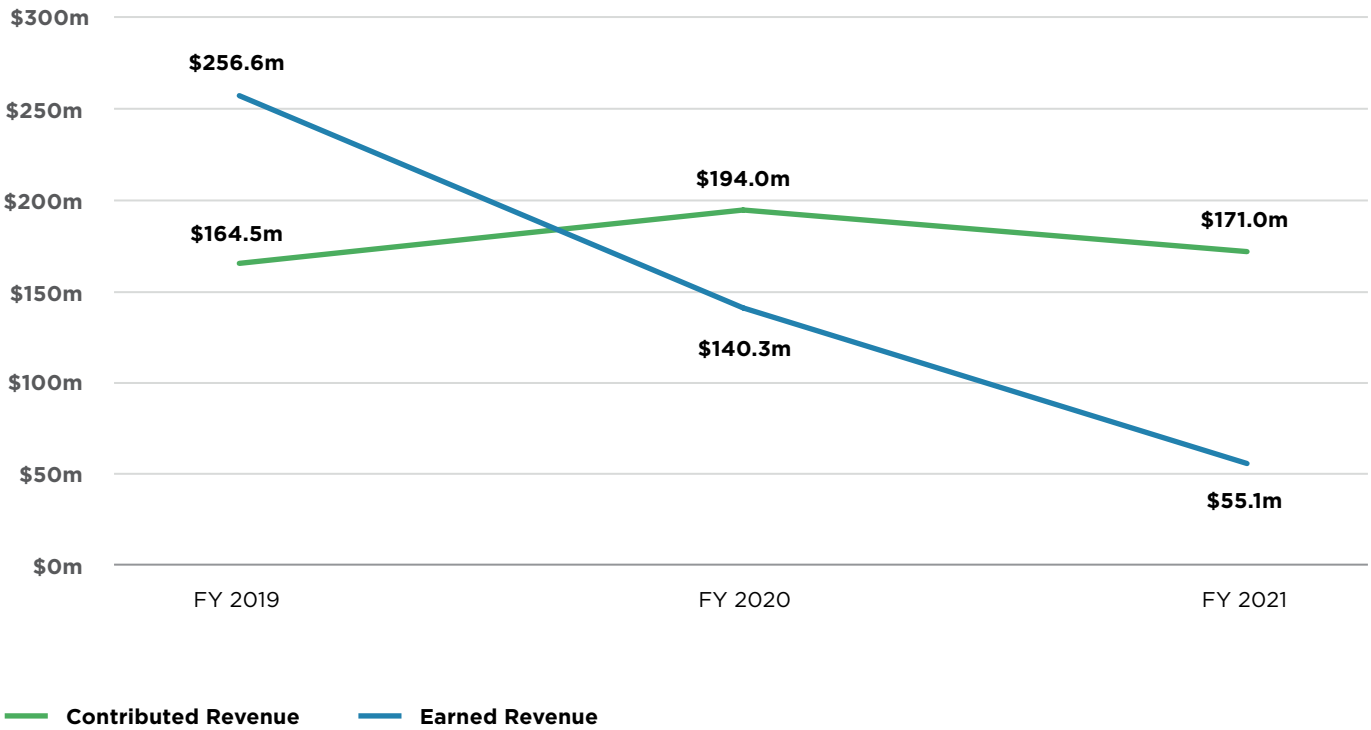
### Grant County Nonprofit Cultural Organization

As the only performing arts theatre of our size in [our region], we struggle, not only financially but determining our role in a rural community...COVID brought us all to our knees and we found ourselves asking who are we, what are we doing to build community, what is our stance on social issues and what is our responsibility to not only the communities we serve but society in general. It took us a beat to recover and maneuver. Once we began to recover from the shock, we asked what can we do and how to we help each other. It was a lesson in community and we learned a great deal.

Total revenues declined by  
**14%**  
between FY 2019 and 2020 and  
are projected to decline again by  
**26%**  
between FY 2020 and 2021.

Earned revenue declined by  
**42%**  
and is projected to drop  
by another  
**51%**

**Exhibit 31**  
Nonprofit Cultural Organization Revenue



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



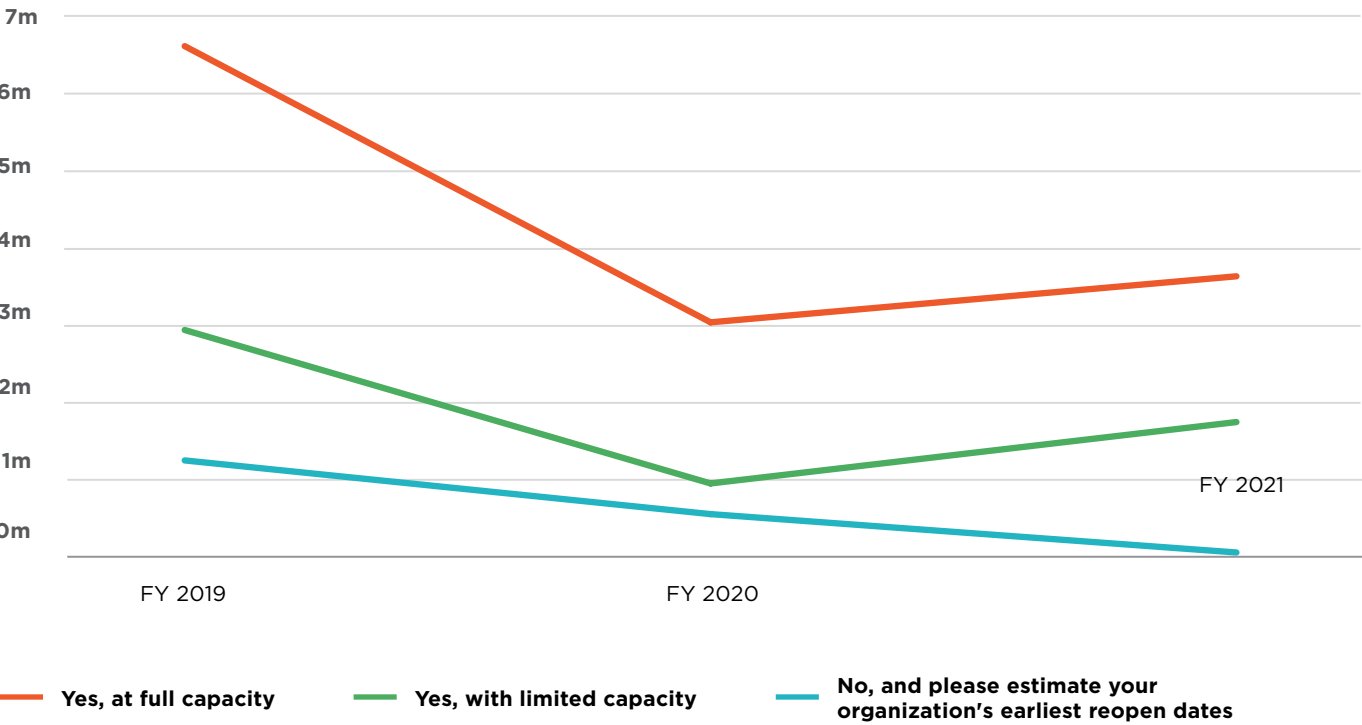
The increases in contributed income seen between FY 2019 and FY 2020, while crucial to survival, cannot be counted on going into the future. While contributed income increased between FY 2019 and FY 2020, it appears to be heading back down in FY 2021, creating the inverted “V” shape in Exhibit 31. Of even more concern is the rise and fall of contributed revenue for BIPOC-identifying organizations. As a group, BIPOC-identifying organizations are reporting FY 2021 contributed revenues lower than their FY 2019 baseline, after having increase 29% between FY 2019 and FY 2020, and then dropping by 50% between FY 2020 and FY 2021.

Qualitatively, there is growing concern about funder and individual giving priorities shifting away from relief and recovery and the arts,

though organizations tell us that their rebuilding efforts will take years. Many organizations saw flagship fundraising events canceled or put on hold due to COVID and signaled that they are seeing signs of “donor fatigue” in their fundraising campaigns.

Ultimately, there seems to be no substitute for the return of participants for sustainable revenue in the future. The good news is that most participants, at the time of the survey, were ready to return to in-person programming (Exhibit 32). The aggregate data clearly shows that those who have fully re-opened are seeing a recovery in participation, though the FY 2021 numbers are just over half of what they were in FY 2019. The nuances of the participation recovery are explored in further detail in the following sections.

**Exhibit 32**  
Nonprofit Cultural Organization Audiences

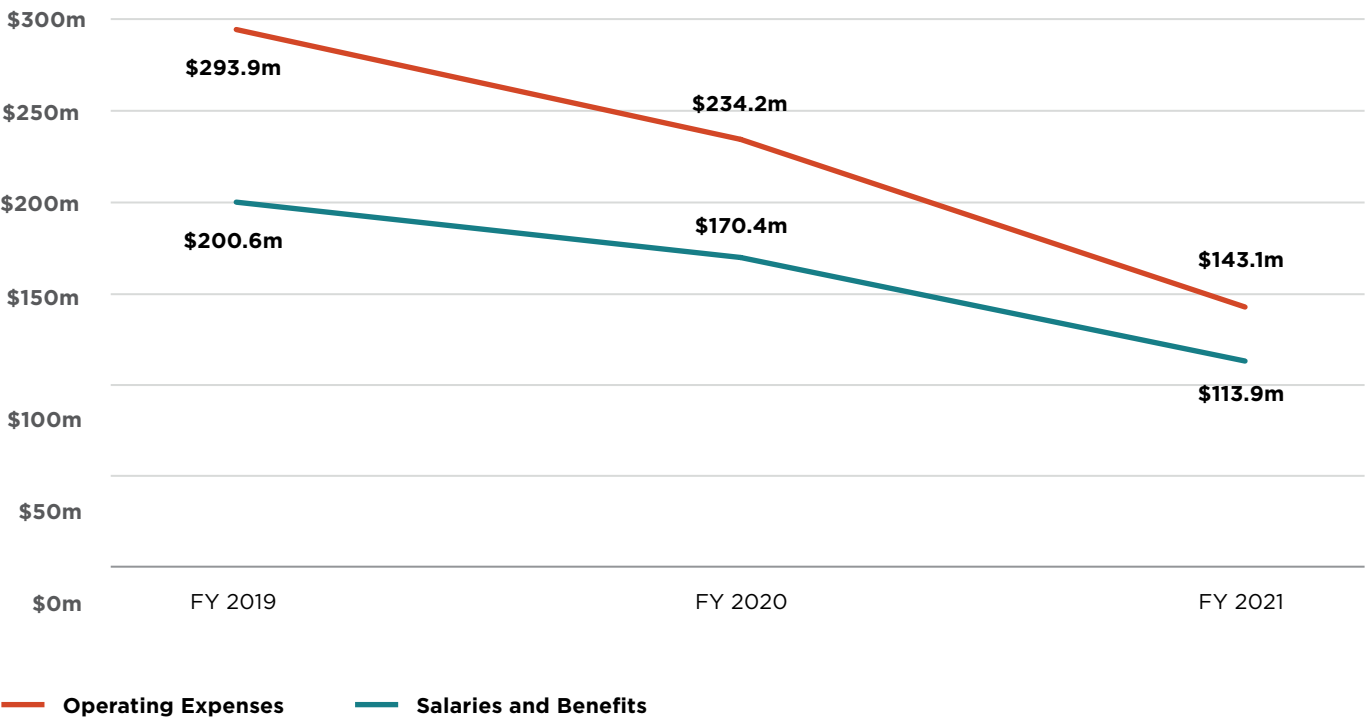


Source: ArtsFund CCIS Nonprofit Organizational Survey, 2021; BERK, 2021. Note: Does not include 4 organizations for which in-person operating was not relevant.

Despite the uptick in participation, operating expenses and salaries and benefits continue on a downward trend (Exhibit 33). This may reflect a time lag, in organizations wanting to be more confident in their participation and earned revenue before rehiring. It may also reflect the turnover and difficulty rehiring that we explored earlier in the study. However, knowing

the operational costs and challenges associated with providing safe, in-person programming in this environment, it is safe to say that the staff remaining at cultural organizations are stretched incredibly thin. Contract payments showed a similar trajectory with a 35% decline expected between FY 2020 and FY 2021.

**Exhibit 33**  
Nonprofit Cultural Organization Operating Expenses and Salaries and Benefits



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

**KEY FINDING:** Participation is recovering, but revenue forecasts continue to decline along with operation expenses.

# SPOTLIGHT

## Statewide Public Opinion

Much of our focus to this point has been on data from nonprofit cultural organizations and cultural participants. If we seek public support for the arts, and a new model that is not so reliant on participation fees alone, we must look to how the public more broadly conceives of and prioritizes arts and culture.

- About two in ten statewide indicated that prior to March 2020 they had participated in cultural programs. Those who said “not at all” make up 39% of all adults.
- About 55% had no participation after March 2020, yet seven out of ten adults say they have supported local cultural organizations in some way since March, 2020. The two most frequently mentioned ways they support are through attending fundraisers and making donations and/or donating funds directly. Sixty-five percent (65%) say they have either donated more funds overall or more funds per organization since March, 2020.
- At the time of the survey, about 70% of the adults polled said they had been vaccinated for COVID. About one in four adults say they have already returned to participating in-person when experiencing cultural programs. About 16% say they prefer to avoid in-person engagement for the foreseeable future. Thus slightly more than half of adults are either ready to return in-person or are unsure and adopt a wait and see position.
- Most (55%) of the adults polled statewide say they value cultural programming about the same now prior to March, 2020. About one third (32%) say the value cultural programming more now with 14% noting the value as less compared to before the pandemic.
- More than half (56%) of those polled feel cultural nonprofit organizations will play an important role in the community’s post pandemic recovery. However, almost one third are unsure/undecided.
- According to poll respondents, key roles for cultural nonprofit organizations to play in the community’s post pandemic recovery include:

- › Economic recovery for businesses and organizations
- › Creating employment for individuals
- › Encouraging community unity and vitality
- › Supporting mental wellness among youth
- › Supporting mental wellness among adults
- In the near term, about 47% of adults, on average say they plan to continue virtual participation in cultural programs and events regardless of the availability of in-person programs.
- As cultural organizations return to in-person programs and events over the next six months, adults in the poll say they will be spending, on average about half (47%) of what they previous were spending before March 2020. This applies to tickets, membership, food or beverage, transit, retail and other categories.
- The top-rated factors which most influence adults about participating in-person with cultural programs or events as they come available include, in rank order:
  - › Content, performers of the program
  - › Organization’s mask and safety policies
  - › Affordability of tickets, admission pricing
  - › Infection rates in my community
  - › Organization’s refund and cancellation policies
  - › Ability to distance within the space (indoors or outside)
- The top five most important reasons adults say they have chosen to participate in cultural activities/programs since March 2020 include:
  - › To celebrate your own or your family’s cultural heritage
  - › To escape or relax
  - › To do something different or change your routine
  - › To experience art
  - › Makes me happy, brings me joy



The Statewide Omnibus Poll is a representative shared cost survey which uses an opt-in consumer panel. The poll was conducted by GMA Research and offers the perspectives of 874 residents across Washington State on the same topics as the Cultural Participant Survey.



## 6.2. RETHINKING THE CULTURAL ORGANIZATION

The decades long shift away from the model of cultural institution with a flagship venue drawing participants was vastly accelerated with the pandemic. Organizations have long been grappling with questions such as “where does programming happen and how do participants interact in the future?” With the pandemic, they reported that the future was placed on their doorstep in a matter of days and weeks.

The future of any cultural organization hinges on staying relevant and connected to their participants. Conversations in arts and culture so often serve as the leading bellwether for social change at a greater scale. Organizations and participants alike are desperate to reconnect after the last 18 months, but participants are making very different calculations of risk and cost about whether to attend in-person programming.

At the same time participants are mentally and emotionally fatigued and eager for social

connection and joy, the kind that only the arts can provide. The Cultural Participant Survey data demonstrates that the participants are still there despite the pandemic-related barriers, but their motivations may have shifted. Half (50%) or more of the cultural participants cited key reasons for being engaged in related programs since March 2020 including “experiencing art”, “makes me happy/brings me joy” (Exhibit 34). Also in the top five are reasons related to wanting to support community organizations. Only 1 out of 10 cultural participants cited wanting to introduce children to the activity, underscoring how younger participants have disproportionately lost access during the pandemic if their participation was dependent on an adult connection, and the complicating layers of technology, schooling, and health concerns affecting young people.



# 50%

or more of the cultural participants cited key reasons for being engaged in related programs since March 2020 including “experiencing art” and “makes me happy/brings me joy.”

*I think people are looking for things that bring hope -- the arts enrich our lives and bring relief/understanding/compassion to the human condition -- it has been a long and weary time and we need things that bring us hope.*

King County Cultural Participant



**Exhibit 34**  
**Responses to Since March 2020, *what have been the reasons for your participation in cultural programs?***

	Cultural participant
To experience art	69%
Makes me happy/brings me joy	67%
To support a community organization or program	64%
To see a specific performer, exhibit, or production	60%
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%
To learn something new/stimulates my personal growth/gives me insight into political and social ideas	48%
To feel less isolated	45%
To do something different/change your routine	43%
To feel creative or creatively inspired/makes me feel creative	43%
To socialize with family or friends	31%
To understand different cultures and perspectives	30%
Promotes social change	26%
To check out a new organization	22%
To learn/refine new skills	20%
To celebrate your own or your family's cultural heritage	15%
To introduce a specific child/children to the activity	10%
For health reasons	7%
For some other reason (Please describe)	4%

Source: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

As documented earlier, many organizations reported rapid pivots to virtual and digital programming and expect continuation of this in some form. However, anecdotally, engagement in these forms peaked earlier in the pandemic and participation has been declining as screen fatigue sets in and they are unable to fully substitute for the social dynamism of in-person experiences. Thirty-nine percent (39%) of organizations reported providing in-person socially distant physical program delivery, including mobile operations. Another 18% reported planning to do so. There may be another wave of innovation yet to come in bringing arts and culture to spaces that are safely open and where people are already gathering for more “essential” reasons, such as work or school.

During closures, many organizations have adapted their programming and made changes to their core mission and organizational structure. One-fifth (20%) have updated their mission statement and another 16% plan to do so. Twenty-one percent (21%) of organizations have modified their board roles and/or structure and another 20% plan to do so.

The future of the arts organization looks to be more networked; 42% reported increases in activities conducted via local partnerships and 94% of those felt this was a permanent shift. Qualitative results indicate that organizations see partnerships as central to rebuilding, and that this thinking is not limited among cultural organizations but includes partnerships across sectors as well.

The future opportunities are exciting, but at present, many organizations reported being unsure about their ability to sustain operations long enough to get there. As relief funding has “dried up,” and donors and participants have yet to be fully re-engaged, cultural organizations are facing potentially several more years of drought. The top three areas where organizations need outside financial support were operating costs, unrestricted funds, and personnel costs (Exhibit 35).





Exhibit 35  
Responses to Top 3 Areas Outside Financial Support Would Be the Most Useful

Operating costs	134	66%
Unrestricted funds	114	56%
Personnel costs	82	40%
Marketing/Communication work	62	30%
Equity/Anti-racism work	45	22%
Artistic Programming	43	21%
Education Programming	34	17%
Technology costs	37	18%
Other (Please specify)	9	4%

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

According to the survey, cultural participants and the general public alike are expecting to spend about half of what they spent prior to the pandemic on cultural participation, likely reflecting continued participation in cultural

programming, but at a reduced frequency. These patterns suggest that cultural organizations may need to fundamentally rethink their business models to accommodate the changes to participation and earned revenue.

**KEY FINDING:** Forty-two percent (42%) of organizations reported increases in activities conducted via local partnerships and 94% of those felt this was a permanent shift. 20% of organizations have updated their mission statement and another 16% plan to do so..

### 6.3. ROLE OF ARTS AND CULTURE

Arts and culture are an integral part of our social and economic fabric. ArtsFund has been documenting and quantifying the role of arts and culture in its Economic Impact Studies since 1991 and conducted their inaugural study of the Social Impact of the Arts in 2018. Consistently the sector has demonstrated its manifold contributions and made the call for support. What is novel is the recent and unprecedented upheaval of the society and economy in which arts and culture exists.

This upheaval has made the essential role of arts and culture more expansive and urgent at the same time that the providers are feeling the most resource constrained and exhausted from 18 months of operating in limbo. It is from this moment that the path divides; the path taken depends in large part on public investment and whether they take cultural organizations up on the potential they offer for recovery.

According to cultural participants polled, nonprofit cultural organizations play a very important role in the post pandemic recovery period. About 93% indicate that role to be very or somewhat important. The top five key roles cultural participants believe cultural nonprofit organizations should play during the post pandemic period include (Exhibit 36):

- Economic recovery for businesses and organizations
- Encouraging community unity and vitality
- Providing entertainment and escape
- Offering inspiration and hope
- Creating employment for individuals

*The pandemic has made me viscerally realize one of the necessary functions of culture and art, and how deeply we need to have space to either create out of our experiences or to see ourselves and our experiences reflected in the creations of others (or both).*

Douglas County Cultural Participant

Exhibit 36

Responses to *What role do you think cultural nonprofit organizations should play in communities post-pandemic?*

	Percent of 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%
Creative re-imagining of post-pandemic economy and society	26%
Re-activating public spaces	24%
Championing the voices of underrepresented communities	17%
Providing educational opportunities for adults and children	16%
Supporting mental wellness among adults	9%
Supporting mental wellness among youth	7%
Processing trauma from COVID-19	5%
Driving cultural tourism	4%
Other (please specify)	2%

Source: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

Almost half of the participants in the survey say they value cultural programming more now than prior to March 2020, while half say they value it the same (Exhibit 37). Only 1% of the cultural participants indicate they value programming less now compared to before.

With 48% of cultural participants placing more value on cultural programming since March

2020 and the high level of importance they place on the role cultural organizations should play in recovery, this is an opportunity to engage and support the sector as a key actor in recovery and in the future.

Exhibit 37

Responses to *How does the current value you place on cultural programming compare to before March 2020?*

	Cultural Participant
I value cultural programming more now than prior to March 2020	48%
I value cultural programming about the same amount as prior to March 2020	51%
I value cultural programming less now than prior to March 2020	1%

Source: ArtsFund CCIS Cultural Participant Survey, 2021; GMA Research, 2021; BERK, 2021.

*I have always felt the 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

99%

of cultural participants say they value cultural programming more or the same amount as pre-pandemic.





---

**KEY FINDING:** Ninety-three percent (93%) of cultural participants indicate that role of cultural organizations will be very or somewhat important to post pandemic recovery. The top 5 roles they felt cultural non-profits should play are: “Economic recovery for businesses and organizations”, “Encouraging community unity and vitality”, “Providing entertainment and escape”, “Offering inspiration and hope”, and “Creating employment for individuals.”

---



## 6.4. FOR FURTHER EXPLORATION AND RESEARCH

We are not at the tail-end of the pandemic, we are at the beginning of a structural transformation. At the time this report was produced, there was much yet to be known about the conditions of the world we are entering. We list these here as an invitation for scholars and institutions to continue research on these themes:

- The geography of arts and cultural participation is transforming. With remote work, downtown cores have emptied while residential neighborhood centers have more foot traffic. Will the idea of downtown cultural centers becoming more dispersed in neighborhoods and outlying communities be realized?
- How have household budgets and priorities for discretionary spending changed? How frequently will individuals participate in arts and culture? How will changes in consumer patterns “ripple” through the local economy, especially with new modes of delivery?
- What portion of the cultural workforce disconnected during this time will return? What will be the pattern in who returns and

who does not? What will be the long-term impacts to volunteerism? Will the sector find a sustainable way to support and retain workers?

- With the significant infusion of public funds, relief funds, and many first-time funders to the arts, will any of this translate to a permanent shift in the funding landscape, including who’s investing in the sector, how they are directing and using the funds, who’s being supported and who’s left out?
- How deeply will the arts be engaged in overall social and economic recovery? Will policymakers and funders find the means to leverage arts and culture for mental health and well-being, community development, and education?
- Will there be a generational impact on youth and their lifetime cultural participation and engagement in arts and culture?
- What will be the outcome of the commitments to racial equity in 2020? Will they be backed by structural shifts in funding and resources?

---

**KEY FINDING:** ArtsFund recommends continued research into the geography of arts access, individual patron behavior, labor impacts, public funding of the arts, engagement of the arts and culture in social and economic recovery, generational impacts on youth and their lifetime cultural participation, and equitable structural shifts.

---

## 7. RECOMMENDATIONS

## 7. RECOMMENDATIONS

The structural shifts spurred by the pandemic are just beginning to come into view. ArtsFund's recommendations center around the idea that arts and culture can be leveraged for social and economic transformation. These recommendations call on those with influence in shaping this transformation by investing with us.

Our recommendations focus on five areas: **Reimagine the Role of Arts and Culture, Expand and Sustain Public Support, Protect the Cultural Workforce, Focus on Equity, and Support Adaptation and Survival.** Each focus area includes stakeholder groups that have unique roles to play:

- **G** – Government and policymakers.
- **O** – Community of cultural organizations.
- **F** – Private funders.
- **C** – Corporations and corporate funders.
- **I** – Individual participants.
- **P** – Partner sectors.

### Reimagine the Role of Arts and Culture

What would an economy and society look like if arts and culture were at the center and not on the margins? Arts can be used as a strategy in complement with other interventions, such as education and youth development, and health and wellness. Survey respondents agreed that arts have a major role to play in economic recovery.

We challenge you to imagine a radically different system and invest accordingly.

- Center the cultural sector in economic development strategies. By investing in local arts and cultural organizations, the economic ripple effects can enable community-wide recovery. (G, C, P)
- Encourage cross-sector partnerships. Across education, social services, hospitality, tourism, and local business districts and chambers, develop and advocate for an arts-centered recovery that benefits all. (O, F, C, P)
- Generate new audience research. Through investing in research and development, we gain better understanding on the continually evolving needs of the sector and communities it serves. (G, O, F, P)

### Expand and Sustain Public Support

Relief funding has been a lifeline for organizations throughout the pandemic. Beyond single-term grant programs, the cultural sector requires multi-year and unrestricted funding to support staff, programs, and general operations.

- Advocate for legislation that provides sustainable funding for the cultural sector. Support and advocate for the passage of Cultural Access Washington in King County and throughout Washington State. (O, F, I)
- Directly invest in arts as a strategy for social impact. Whether it be through education, youth development, neighborhood vitality, or health and wellness, arts and culture have demonstrated its positive impact on our lives. (G, O, F, C, I, P)



Protect the Cultural Workforce

The cultural workforce is core to the future of the sector, and there is no substitute for people’s creative energy. Occupations in arts and culture have long been underpaid, overworked, and highly sensitive to economic downturns. Pathways to stable and sustainable employment are needed both for organizations and for future and existing cultural workers.

- Pilot models to increase cultural worker wages and wage stability. In the current funding model, organizations can’t do this on their own; governments can help compensate cultural workers for the indirect public benefits they provide. (G, O, F, C)
- Expand employment definitions and eligibility criteria. Comprehensive language is needed for employment-related benefits to cover cultural workers that include independent contractors. (G)
- Invest in services to make arts occupations more viable. Opportunities can include affordable workforce housing, affordable creative space, pooled benefits, and social insurance. (G, O, F, P)
- Create avenues for cultural organizations to learn from each other. Share resources in adaptive management and strategic and business planning, and support pathways to attract new cultural workers. (F, O, C)

Focus on Equity

The impacts of the pandemic have not manifested equitably, and preexisting gaps have widened into chasms. This is particularly true for BIPOC artists, BIPOC organizations, youth, and people with disabilities. To center communities most impacted, we need to

collectively chart a course on how to dismantle systemic, institutional, and other barriers.

- Actively eliminate funding barriers. Streamline grant applications, integrate relevant communities into decision-making processes, prioritize multi-year funding projects, and support access to funding opportunities. (G, F, C)
- Engage youth and families. Partner with schools and out of school time programs to bring arts engagement experiences to youth. Confront the erosion of K-12 arts funding through sustained support for arts education (O, N, P).
- Learn from and better serve disability communities. Collaborate on developing lessons learned and best practices gained regarding serving people with disabilities and promulgate them to strengthen the entire sector. (O, P)
- Help diminish the digital divide. Advocate for reliable broadband access, which disproportionality impacts non-white people, low income, or rural communities. (G, I)

Support Adaptation and Survival

The impacts of the pandemic have not Cultural organizations and communities are still in the midst of adaptation to a permanently changed operating environment. Few had operating “rainy day” reserves at the start of the pandemic and those that did have spent them down. We request you to support organization’s financial safety nets, which are essential to any business innovating and adapting.

- Provide unrestricted, multi-year support. Enable cultural organizations to make structural business model adaptations to



the new operating environment and to continue to be nimble. (G, F, C)

- Further access to technology. Make short-term or one-time investments or partnerships in technology and upskilling to support ongoing accessibility and virtual programming. (G, F, C)
- Support public health initiatives. Provide financial support and expertise for short-term compliance with public health requirements and re-opening plans. (G, F)
- Participate and give! Whether in person or online, partaking in and supporting the joy, excitement, introspection, and communion that only arts and culture can provide helps organizations survive and thrive. (O, I, F, P, C)

After nearly two years since the first case of COVID was detected in Washington State, the arts and cultural sector has been irrevocably changed. The sector’s vulnerabilities were exposed, and the financial and organizational impacts of the pandemic continue to ripple, making the stakes in this moment incredibly high. At the same time, cultural organizations have demonstrated incredible creativity and resolve that speaks to the promise of what greater sustained investment could do for the sector, and in turn, for the communities and economies that rely on them. This is a moment to emerge in new way.

# 8. APPENDIX

## 8. APPENDIX

### 8.1 Participating Groups by Region

**Northwest (Clallam, Island, Jefferson, San Juan, Skagit, Whatcom)**

- Allied Arts of Whatcom County
- Celtic Arts Foundation
- Feiro Marine Life Center
- Friday Harbor Film Festival
- Hedgebrook Foundation
- Island Shakespeare Festival
- Juan de Fuca Foundation for the Arts
- Northwest Maritime Center
- Port Townsend Film Festival
- SARATOGA ORCHESTRA OF WHIDBEY ISLAND
- Sequim City Band
- Skagit Valley Genealogical Society
- Whidbey Children’s Theatre
- Wolf Hollow Wildlife Rehabilitation Center

**Southwest (Clark, Cowlitz, Grays Harbor, Lewis, Mason, Pacific, Skamania, Thurston, Wahkiakum)**

- Appelo Archives Center
- Arbutus Folk School
- Columbia Arts Network
- Columbia Theatre Association for the Performing Arts
- Creative Theatre Experience
- Lewis County Historical Museum
- Long Beach Peninsula Acoustic Music Foundation
- North Beach Artists Guild
- NORTHWEST CARRIAGE MUSEUM
- Olympia Musical Theater
- Rochester Citizens Group

**Eastern (Adams, Asotin, Benton, Chelan, Columbia, Douglas, Ferry, Franklin, Garfield, Grant, Kittitas, Klickitat, Lincoln, Okanogan, Pend Orielle, Spokane, Stevens, Walla Walla, Whitman, Yakima)**

- Cashmere Museum & Pioneer Village
- Chewelah Performing and Cultural Arts
- Children’s Museum of Walla Walla
- Columbia Basin Allied Arts
- Creative Arts Alliance (dba Spokane International Film Festival)
- Desert Fiber Arts
- Friends of Stonerose Fossils
- Kittitas County Historical Society, Inc
- Spark Central
- Spokane Fall Folk Festival
- Spokane Folklore Society Fall Folk Festival
- Spokane Potters Guild
- Spokane Symphony & Martin Woldson Theater at The Fox
- Spokane Valley Summer Theatre
- Stage Left Theater Association
- The Seasons Music Festival
- Thin Air Community Radio
- Tieton Arts & Humanities
- Vytal Movement Dance
- Warehouse Theatre Company

**Central Puget Sound (King, Kitsap, Pierce, Snohomish)**

- 18th & Union
- A Contemporary Theatre
- Alchemy Tap Project
- America SCORES Seattle
- Arboretum Foundation
- Art Walk Edmonds
- Artist Trust
- ArtsFund
- Ascendance Pole and Aerial Arts
- Asia Pacific Cultural Center



- Auburn Symphony Orchestra
- Bainbridge Artisan Resource Network (BARN)
- Bainbridge Arts & Crafts
- Bainbridge Island Historical Museum
- Bainbridge Island Museum of Art
- Bandit Theater
- Book-It Repertory Theatre
- Boxley Music Fund dba JazzClubsNW
- Bremerton Historic Ship Association
- Burien Arts Association
- Burke Museum Association
- C895 / KNHC PUBLIC RADIO ASSOCIATION
- Camlann Medieval Association
- Capoeira Life
- Cascadia Art Museum
- Chamber Music Madness
- Chinese Radio Seattle
- Choir of the Sound
- Circle of Friends for Mental Health
- Classical KING FM
- Comunidad Latina de Vashon
- Coyote Central
- Croatiafest
- Dandylyon Drama
- Deaf Spotlight
- Densho
- Diverse Harmony
- DuPont Historical Society
- Early Music Seattle
- Earshot Jazz
- Edmonds Driftwood Players
- El Centro de la Raza
- Experience Learning Community dba The Museum of Pop Culture
- Fall City Arts
- Filipino Community of Seattle
- Flying House Productions dba Seattle Choruses
- Foss Waterway Seaport
- Freehold Theatre Lab Studio
- Friends of KEXP
- Gambian Talents Promotion
- Henry Gallery Association, Inc.
- Highline Heritage Museum
- Hilltop Artists
- Holocaust Center for Humanity
- HONK! Fest West
- Hugo House
- Infinity Box Theatre Project
- Inspire Washington
- Intiman Theatre
- ISLANDWOOD
- Italian Cultural Center Il Punto
- Jack Straw Cultural Center
- Japan-America Society of the State of Washington
- Khambatta Dance Company
- Kids Discovery Museum
- KidsQuest Children's Museum
- Kirkland Civic Orchestra
- Kitsap History Museum
- LANGSTON
- Living Voices
- Marysville Historical Society
- Mirror Stage
- Museum of Glass
- Music Center of the Northwest
- Music Northwest
- Music Works Northwest
- National Nordic Museum
- NFFTY/The Talented Youth
- Northshore Performing Arts Foundation
- Northwest African American Museum
- Northwest Chamber Chorus
- Northwest Choirs (Northwest Boychoir & Vocalpoint! Seattle)
- Northwest Culture Foundation
- Northwest Film Forum
- Northwest Sinfonietta
- ocheami
- Olympic Ballet Theatre
- On the Boards
- Orquesta Northwest
- Pacific Ballroom Dance
- Pacific Northwest Ballet
- Parkour Visions
- Path with Art
- Penguin Productions
- PERFORMING ARTS CENTER EASTSIDE
- Pierce Center for Arts & Technology dba Arivva
- Pongo Poetry Project
- Pottery Northwest
- Queen Anne Historical Society
- Red Eagle Soaring
- Refugee Artisan Initiative
- Sammamish Symphony Kirkland Civic Orchestra
- Sand Point Arts and Cultural Exchange
- Seattle Aquarium
- Seattle Architecture Foundation
- Seattle Art Museum
- Seattle Arts & Lectures
- Seattle Burlesque and Cabaret Co-op
- Seattle Chamber Music Society
- Seattle Children's Theatre
- Seattle Collaborative Orchestra, Saratoga Orchestra, Pacific NW Conducting
- Seattle JazzED
- Seattle Latino Film Festival
- Seattle Opera
- Seattle Pro Musica
- Seattle Public Theater
- Seattle Rep
- Seattle Repertory Jazz Orchestra
- Seattle Symphony Orchestra
- Seattle Theatre Group
- Seattle Young Artists Music Festival Association
- Seattle Youth Symphony Orchestra
- SEEDArts
- ShoreLake Arts
- SIFF
- Somali Bantu Community Services of Washington
- SoundBio Lab
- Stemtac Foundation
- Stillaguamish Valley Pioneers Assoc./Museum
- Studio East
- Sundiata African American Cultural Association
- Symphony Tacoma
- Tacoma Arts Live
- Tacoma Musical Playhouse
- Tacoma Youth Symphony Association Inc.
- Taproot Theatre Company
- Tasveer
- Ted Brown Music Outreach
- TeenTix
- The 5th Avenue Theatre
- The Center for Wooden Boats
- The Creative Center for Adaptive Praxis
- The Dance Thing
- The Esoterics
- The Frye Art Museum
- The Museum of Flight
- The Vera Project
- The Williams Project
- Theatre33
- Totem Star
- Town Hall Association
- United Indians of All Tribes Foundation
- Urbanists Collective
- Vashon Center for the Arts
- Vashon Island Chorale
- Vashon Opera
- Velocity Dance Center
- Voices of Pacific Island Nations
- Washington Ensemble Theatre
- Weed Warriors
- West Sound Chorus
- Western Washington Center for the Arts
- Whim W'Him
- Wing Luke Museum of the Asian Pacific American Experience
- Woodland Park Zoo
- Youth in Focus



## 8.2 Acknowledgements

In addition to our **funders** and our **Advisory Committee**, whose cross-sector and statewide collaboration was instrumental in bringing this work to fruition, ArtsFund would like to thank the following people and partners for their invaluable contributions: our phenomenal team of expert consultants – **Vivien Savath of BERK Consulting, Don Morgan of GMA Research, and Dr. William Beyers** – for working with us tirelessly to envision and modify the study alongside the pandemic’s evolving timeline; Our outreach partners at **4Culture, 501 Commons, ArtsWA, City of Seattle Office of Arts & Culture, Innovia Foundation, Inspire WA, KING 5, M.J. Murdock Charitable Trust, Spokane Arts, and WA Nonprofits**, and community partners **Priya Frank and Kathy Hsieh**, whose amplification and endorsement was key in ensuring representative statewide data collection; **Sue Coliton**, ArtsFund’s Interim CEO from September 2019-May 2020, for shaping our early COVID response strategy and initial sector snapshot data collection; ArtsFund’s **Policy & Advocacy Committee** for their leadership and oversight; **Pete Dapper, Anna Baker** and the creative team at **Dapper + Associates** for the vision and design of the report, collateral materials and digital presence;

**Casey Moser**, for early research support; the **hundreds of statewide cultural organizations**, the five case study organizations (**LANGSTON, Seattle Art Museum, Spark Central, Tasveer, and TeenTix**); and the **1500+ individual survey respondents** for sharing their data and stories. The work on this report spans the duration of the pandemic thus far, and we thank the ArtsFund board and staff for their commitment and adaptation throughout; in particular, thanks to **Katy Corella** and **Steffi Morrison** for bringing their voices and attention to detail to all aspects of their management of this project. This report has been designed and executed, and all data submitted and analyzed, by partners and staff primarily working from home, juggling countless personal and professional pandemic-related challenges. Thank you to the colleagues, partners, family, friends, neighbors, children and pets who have supported us in this, and all else, during this time. Finally, thank you to the artists, arts administrators, cultural workers, volunteers, and nonprofit cultural organizations for all you have done, and all you continue to do, to strengthen communities throughout Washington State.





### 8.3 Photo Credits

**Cover:** Seattle Symphony, Simone Porter performs with Seattle Symphony musicians at Benaroya Hall, conducted by Shiyeon Sung, photo by James Holt.

Youth in Focus, Creative Career Cohort class 2021, photo courtesy of Youth in Focus.

**ToC:** Youth in Focus, Creative Career Cohort class 2021, photo courtesy of Youth in Focus

**Pg. 3:** Velocity Dance Center, Amy O’Neal class 2 for SFD+I, photo by Jim Coleman 2021

**Pg. 4:** Seattle Symphony, Beethoven Eroica Symphony concert featuring guest conductor Thomas Wilkins, photo by James Holt.

**Pg. 7:** Seattle Art Museum, Seattle Asian Art Museum Reopening art making, photo by Jueqian Fang.

**Pg 8:** Hugo House, photo by Doug Manelski.

**Pg 9:** Seattle Symphony, Beethoven Eroica Symphony concert, photo by James Holt.

**Pg 10:** Auburn Symphony Orchestra, photo by Nonet Wesley Schulz.

**Pg 12:** Snohomish County Music Project, Toddler Playing a Yellow Shaker, photo courtesy of the Snohomish County Music Project.

**Pg 14:** Coyote Central, Pop Art Portraits at Coyote Central, photo by Jessica Schwab.

**Pg 17:** Hilltop Artists, Sam Scalise, Ben Johnsen, and Trenton Quiocho, Live Halloween Blow, photo courtesy of Hilltop Artists.

**Pg 19:** Burke Museum, Reopening 1 (Paleontology gallery), photo by Andrea Godinez/Burke Museum.

**Pg 20:** Symphony Tacoma, photo courtesy of Symphony Tacoma.

**Pg 24:** Seattle Opera, photo by Philip Newton.

**Pg 27:** Seattle Children’s Theatre, Summer 2021 Drama School Student, photo by Eliane Rodriguez.

**Pg 32:** Seattle JazzED, 2019 Summer Prep Camp Saxophones, photo courtesy of Seattle JazzED.

**Pg 33:** Wing Luke Museum, Doan Diane Huang Dy, Senior Tour Manager at the Wing Luke Museum presents a virtual tour 2021, photo courtesy of Wing Luke Museum.

**Pg. 37:** Hilltop Artists, 2020 Making of Auction Pieces, photo by Verbovski.

**Pg. 39:** Seattle JazzED, Summer Second Line Camp 2019, photo courtesy of Seattle JazzED.

**Pg. 43:** Museum of Pop Culture (MoPOP), Girl Scout Day at the Museum, photo courtesy of MoPOP.

**Pg. 47:** Museum of Pop Culture (MoPOP), Live at MoPOP School Performance, photo courtesy of MoPOP.

**Pg. 48:** Whim W’Him, “Nova” rehearsal, photo courtesy of Stefano Altamura.

**Pg. 50:** Seattle Art Museum, Seattle Asian Art Museum Reopening performance, photo by Jueqian Fang.

**Pg. 56:** Tacoma Arts Live, Family Night, photo courtesy of Tacoma Arts Live.

**Pg. 57:** Nordic Museum, La Vaughn Belle: A History of Unruly Returns, photo courtesy of Nordic Museum.

**Pg. 58:** Symphony Tacoma, photo courtesy of Symphony Tacoma.

**Pg. 59:** Jack Straw Cultural Center, Abi Pollokoff, photo courtesy of Jack Straw Cultural Center.

**Pg. 63:** Village Theatre, Cast of Million Dollar Quartet, 2019, photo by Mark Kitaoka.

**Pg. 64:** Museum of Pop Culture (MoPOP), Mini Maker Faire, photo courtesy of MoPOP

**Pg 68:** LANGSTON, Jazzmeia, photo courtesy of LANGSTON.

**Pg 70:** LANGSTON, African Remix, photo courtesy of LANGSTON.

**Pg. 71:** LANGSTON, Africa Remix, photo courtesy of LANGSTON.

**Pg. 73:** Seattle Art Museum, Installation view of “City of Tomorrow: Jinny Wrights and the Art That Shaped a New Seattle” at Seattle Art Museum, 2020, photo by Natali Wiseman.

**Pg. 74:** Seattle Art Museum, Seattle Asian Art Museum Reopening performance, photo by Jueqian Fang.

**Pg. 76:** Spark Central, photo courtesy of Spark Central.

**Pg. 77:** Spark Central, photo courtesy of Spark Central.

**Pg. 78:** Tasveer, Tasveer Festival: Watch. Read. Talk, Opening Night Event, photo by Saga Mey.

**Pg. 80:** Tasveer, Tasveer Festival: Watch. Read. Talk, Opening Night Event, photo by Saga Mey.

**Pg. 82:** TeenTix, Teens at Seattle Art Fair\_2019, photo courtesy of TeenTix.

TeenTix, Film Criticism Workshop with SIFF Jan 2020, photo courtesy of TeenTix.

**Pg. 84:** NFFTY, Film Career Day 2019 Rayka Zehtabchi Keynote, photo by David Rzegocki.

**Pg. 88:** Red Eagle Soaring, Seattle Indigenous Youth Arts & Performances, photo courtesy of Red Eagle Soaring.

**Pg. 91:** Tacoma Arts Live, Performance at Dia de los Muertos, photo courtesy of Tacoma Arts Live.

**Pg. 93:** Northwest African American Museum, Knowledge is Power Book Giveaway Program, photo by Jen Norling.

**Pg. 97:** Tacoma Arts Live, Caravan Chronicles Tacoma Arts Live, photo by Lisa Monet Photography.

**Pg. 98:** Seattle JazzED, 2019 Summer Prep Camp Stand Up Basses, photo courtesy of Seattle JazzED.

**Pg. 103:** Museum of Pop Culture (MoPOP), Indie Game Revolution Exhibition, photo courtesy of MoPOP.

**Pg. 109:** Tasveer, Tasveer Festival: Watch. Read. Talk, Opening Night Event, photo by Saga Mey

## 8.4 Exhibit Titles

<b>Exhibit 1</b> “Regional Definitions Used in the Study”	Section 4.1 (page 20)	<b>Exhibit 12</b> “Access to Pandemic Relief Funds”	Section 4.4 (page 34)	<b>Exhibit 22</b> “Total Contributed Revenue Among BIPOC-identifying organizations”	Section 4.9 (page 53)	<b>Exhibit 31</b> “Nonprofit Cultural Organization Revenue (FY 2019 to FY2021)”	Section 6.1 (page 85)
<b>Exhibit 2</b> “Nonprofit Organizational Survey Respondents by Region”	Section 4.1 (page 21)	<b>Exhibit 13</b> “Access to Pandemic Relief Funds by Region	Section 4.4 (page 35)	<b>Exhibit 23</b> “Centering BIPOC Voices and Equity/Anti-Racism Work in Response to the Pandemic”	Section 4.9 (page 55)	<b>Exhibit 32</b> “Nonprofit Cultural Organization Participation (FY2019 to FY 2021)”	Section 6.1 (page 86)
<b>Exhibit 3</b> “Nonprofit Organizational Survey Respondents by BIPOC Identity”	Section 4.1 (page 21)	<b>Exhibit 14</b> “Access to Pandemic Relief Funds by Organization Size”	Section 4.4 (page 36)	<b>Exhibit 24</b> “Nonprofit Organizational Survey Respondents by Opening Status”	Section 4.10 (page 58)	<b>Exhibit 33</b> “Nonprofit Cultural Organization Operating Expenses and Salaries and Benefits (FY 2019 to FY 2021)	Section 6.1 (page 87)
<b>Exhibit 4</b> “Nonprofit Organizational Survey Respondents by Organization Size in 2019	Section 4.1 (page 22)	<b>Exhibit 15</b> “Washington State Arts and Cultural Institution Reported Employees and Wages”	Section 4.6 (page 40)	<b>Exhibit 25</b> “Responses to Top 3 Challenges Associated with Returning to In-Person Programming”	Section 4.10 (page 59)	<b>Exhibit 34</b> “Responses to Since March 2020, what have been the reasons for your participation in cultural programs?”	Section 6.2 (page 92)
<b>Exhibit 5</b> “Nonprofit Organizational Survey Respondents by Discipline”	Section 4.1 (page 23)	<b>Exhibit 16</b> “Washington State Weekly Unemployment Claims in Performing Arts and Spectator Sports, Museums, Historical Sites, Zoos and Parks”	Section 4.6 (page 41)	<b>Exhibit 26</b> “Responses to Top 3 Challenges Associated with Returning to In-Person Programming by Opening Status	Section 4.10 (page 60)	<b>Exhibit 35</b> “Responses to Top 3 Areas Outside Financial Support Would Be the Most Useful”	Section 6.2 (page 94)
<b>Exhibit 6</b> “Summary of 2019-2020 Changes to Cultural Organization Financials”	Section 4.2 (page 26)	<b>Exhibit 17</b> “Proportion of organizations naming hiring/ rehiring staff as a top 3 challenge by organizational open status	Section 4.6 (page 44)	<b>Exhibit 27</b> “Responses to Top 3 Challenges Associated with Returning to In-Person Programming by Organizations Size	Section 4.10 (page 61)	<b>Exhibit 36</b> “Responses to What role do you think cultural nonprofit organizations should play in communities post-pandemic?”	Section 6.3 (page 96)
<b>Exhibit 7</b> “Median Change in Key Financial Metrics between FY 2019 and FY 2020”	Section 4.2 (page 28)	<b>Exhibit 18</b> “Proportion of organizations naming hiring/ rehiring staff as a top 3 challenge by organizational size”	Section 4.6 (page 44)	<b>Exhibit 28</b> “Responses to How do you feel about returning to in-person participation to cultural programs?”	Section 4.10 (page 62)	<b>Exhibit 37</b> “Responses to How does the current value you place on cultural programming compare to before March 2020?”	Section 6.3 (page 97)
<b>Exhibit 8</b> “Responses to How frequent did you participate in Cultural programs?”	Section 4.3 (page 29)	<b>Exhibit 19</b> “Shifts to Remote Work and Digital Programming in Response to the Pandemic”	Section 4.7 (page 46)	<b>Exhibit 29</b> “Responses to When is the earliest you plan to participate in in-person cultural programming?”	Section 4.10 (page 63)		
<b>Exhibit 9</b> “Responses to Since March 2020, what types of cultural programming have you participated in?	Section 4.3 (page 30)	<b>Exhibit 20</b> “Changes to Earned and Contribute Income from Outside your County since March 2020”	Section 4.7 (page 47)	<b>Exhibit 30</b> “Responses to Please rate the following factors in your decision whether to participate in a cultural program in-person when available”	Section 4.10 (page 65)		
<b>Exhibit 10</b> “Responses to Outside of program tickets, how have you supported local cultural organizations since March 2020?”	Section 4.3 (page 31)	<b>Exhibit 21</b> “Responses to Of the cultural programs you participated in since March 2020, please estimate the approximate percentage of where those programs were produced”	Section 4.7 (page 49)				
<b>Exhibit 11</b> “Responses to How has your financial support to cultural organizations (outside of program tickets and fees)changed, if at all, since March 2020?	Section 4.3 (page 31)						





[www.artsfund.org](http://www.artsfund.org)