



IMPACT OF COVID-19 ON THE ARTS AND CULTURE SECTOR IN PETERBOROUGH AND BEYOND: EC3 SEPTEMBER 2020 ROUNDUP

Executive Summary

The COVID-19 crisis has had a devastating impact on both individual artists and arts organizations in the arts and culture sector. Lockdowns have resulted in many cancelled and postponed seasons, special events, regular gigs and festivals. Box office and tickets sales of all kinds have evaporated, exhibition and performance fees vanished. Opportunities for donations, sponsorships, and fundraisers have slowed dramatically. These impacts may well continue long after lockdown orders are lifted, as audiences feel cautious returning to venues, the global economic downturn's effects continue to be felt, and many artists and organizations cope with the revenue losses from now-cancelled summer festivals and events, as well as the postponement of entire seasons. The result is a catastrophic loss of revenue for many artists and arts and culture organizations. Some organizations have had to lay off staff and there have been permanent closures, and without further assistance measures, many more closures and layoffs may be expected in the coming months. Any downturn in the arts sector has a ripple effect on the local economy, impacting the service sector, retail, hospitality, and tourism industries.

This report details recent research by Canadian and Ontario not-for-profit service organizations, government agencies, and others on these impacts, as well as how the crisis is affecting local Peterborough organizations. It includes information on various audience retention and attraction studies on what it will take to win trust and confidence in returning audiences. Combined with our previous [Roundup of Reopening Guides](#), we hope this document will provide valuable background information for arts leaders and decision makers.

Introduction

The COVID-19 crisis has had a profound impact on nearly every aspect of our lives in Peterborough and all across Canada, but few sectors have been hit as hard as arts and culture. While local artists and arts organizations provide first-class culture experiences in the best of times, and Peterborough's artists win prizes and enjoy success at so many levels, this is still a very vulnerable and precarious sector. Peterborough audiences are enthusiastic and private support for the arts is remarkable for a city our size, but the pandemic has totally disrupted those essential relationships with serious consequences. Not being able to make, present, and experience art takes an emotional, as well as a financial/economic, toll.

As lockdown procedures were put in place, most organizations' operations hit a standstill. Concerts, exhibitions, performances, festivals, and other events ceased, and so have most other avenues for generating revenue. However, many organizations must maintain their fixed operating costs in order to be ready to resume activities when the time comes. This has impacted individual artists as well as arts and culture organizations in similar, yet distinctive, ways. Some artists and organizations have been able to create virtual programming, others have made use of outdoor spaces as restrictions lift. Everyone is working hard to find workable operating models that respect COVID-19 health and safety regulations, maintain artistic integrity, and are financially viable.

Arts and culture service organizations currently continue to assess the exact size and scope of the impacts, with surveys sent to members and other forms of data collection (see Appendix A for a list of studies and surveys). EC3 has been monitoring the situation since the middle of March, and providing various updates in our Peterborough Arts Alive Bulletins and social media posts, and we are in constant contact with the ACH sector locally and the national, provincial, municipal, and discipline-specific arts service associations across the country. This report provides a snapshot of the information flowing in from various surveys, studies, and from our

own Roundtables, as well as conversations with individual artists and arts leaders in our community and beyond. It attempts to explain the impacts of the crisis and the areas of greatest need.

Current and Short-Term Impacts

Event Cancellations

The closure of non-essential “businesses” meant that galleries, museums, art studios, theatres, concert halls, and bars were closed across the province. 94% of arts organizations in Ontario have reported cancelled or postponed events.¹ Toronto performing arts venues have seen an 81% reduction in ticket sales.² I Lost My Gig, a website set up by ArtsPond / Étang d’Arts to track the impact of the pandemic on musicians, has documented 28,491 cancelled or postponed gigs across Canada – an average of 36 per musician.³

Locally, this has already had an impact on the Peterborough summer festival season. Peterborough Musicfest has postponed its entire 2020 season. The 2020 Havelock Jamboree has been postponed indefinitely. The Peterborough Folk Festival, Peterborough Pulse, and the Multicultural Canada Day Live Festival were cancelled for this year. These cancellations have been very difficult for the organizations, their employees, and the artists they would have hired.

Fundraising Slowed

The majority of arts and culture organizations in Peterborough are non-profits and charities, who rely on donations and sponsorships.

As many businesses are closed, and many fundraising events cancelled, the opportunities for fundraising have been severely limited. In Peterborough, benchmark annual fundraisers like Artspace’s 50/50 Gala, The Theatre on King’s Murder on McDonnell, the Art Gallery of Peterborough’s It’s All About ART, and EC3’s Peterborough Arts Awards have been postponed due to the pandemic. Another local organization highlighted in an email to EC3 that it frequently

¹ Ontario Arts Council, *Early COVID-19 Impacts on OAC-Funded Arts Organizations* (Toronto: Ontario Arts Council, 2020).

² Toronto Alliance for the Performing Arts, *TAPA COVID-19 Virus Impact Survey Results* (Toronto: Toronto Alliance for the Performing Arts, 2020), accessed May 15, 2020, <https://tapa.ca/tapa-covid-19-virus-impact-survey-results>.

³ Hill Strategies, *I Lost My Gig Canada: Impacts of COVID-19 on Canadian Artists and Independent Cultural Workers* (Hamilton: Hill Strategies, 2020), accessed August 26, 2020, <https://hillstrategies.com/resource/i-lost-my-gig-canada/>.

runs garage sales, a golf tournament, and other activities as fundraisers, all of which have ceased.

Furthermore, the global economic insecurity caused by the pandemic is resulting in fewer donors and sponsors with less funds available to give.

The result is an overall reduction in philanthropic giving. 74% of Ontario non-profits are expecting or experiencing a reduction in revenues from fundraising, and 82% of Toronto performing arts organizations have reported a reduction in philanthropic giving.^{4 5}

Lost Revenue

The COVID-19 pandemic has hit the arts and culture community particularly hard, as virtually all revenue streams for most artists have been cut off.

Ticket sales (box office) have halted and many refunds have had to be issued as performing arts venues, concert halls, and theatres shut their doors and festivals postpone or cancel, which has also resulted in cancelled gigs and tours for performers and artists. Galleries, museums, and art fairs have closed, resulting in a halt to admissions and memberships in those organizations, and a halt to art sales that the organizations and artists rely on. The closure of spaces has also slowed secondary income sources for these organizations and artists, such as merchandise sales, space and equipment rentals, and revenue-generating private events fees and private contracts. The economic downturn, and people's reluctance to spend money right now, has also impacted these revenue streams, as well as slowing donations and sponsorships.

Ontario Arts Council (OAC) estimated that by the end of June, the organizations they fund would lose a combined total of \$128 million in revenue, and the arts and culture sector in Ottawa alone anticipates losses totalling \$63.8 million in that same time.^{6 7} Almost half of Ontario non-profit organizations will experience losses between \$50,000 and \$249,999 because of the pandemic.⁸ New surveys will soon provide estimates to the end of fiscal 2020.

⁴ Ontario Non-profit Network, *Ontario Non-profits and the Impact of COVID-19: A flash survey report* (Toronto: Ontario Non-profit Network, 2020).

⁵ Toronto Alliance for the Performing Arts, *ibid.*

⁶ Ontario Arts Council, *ibid.*

⁷ Ottawa Arts Council, email correspondence with the author, May 8, 2020.

⁸ Ontario Non-profit Network, *ibid.*

The impact is also being felt by individual artists. 74.4% of artists living in Montreal expected losses between \$5,000 and \$29,999 by June 1.⁹ Artists in Ottawa expected to lose a total of \$51.6 million if the summer festival season was cancelled. The Ottawa survey found that impact is particularly severe on artists who depend on public performance (including musicians, singers, and performing artists), as well as graphic designers and illustrators, authors and writers, and visual artists.¹⁰

Jobs Lost

The loss of revenue is almost certain to result in job losses. One third of Ontario non-profit organizations have already had to reduce hours or laid off staff.¹¹ 71% of Ontario arts organizations expected to have to take action related to staffing by the end of June.¹²

These effects have hit part-time and contract employees particularly hard. While 9.5% of arts and culture organizations in Ottawa have had to temporarily or permanently lay off full-time staff, that number jumps to 60% for part-time staff.¹³

Laying off part-time and temporary staff is a more palatable solution for many organizations, as it is less likely to disrupt long-term operations and essential staff. However, part-time and contract workers are more likely to experience general income insecurity, and so this lost income could be devastating for them.

One Peterborough arts organization EC3 spoke to was concerned about “potential job losses of staff and service contractors for artistic positions within the... organization,” and another said they already “have staff who are unemployed as instructors as well as performers.”

An analysis of jobs number from Statistics Canada by the Canadian Association for the Performing Arts (CAPACOA) seems to bear that out. Employment numbers in the arts, entertainment, and recreation sector did go up in July 2020 compared to the previous month, which is consistent with summer seasonal employment trends – however, when compared to

⁹ Culture Montreal, *Coronavirus (COVID-19) Questionnaire: Evaluation des impacts sur le milieu culturel montréalais (individus)* (Montreal: Culture Montreal, 2020).

¹⁰ Ottawa Arts Council, *ibid.*

¹¹ Ontario Nonprofit Network, *ibid.*

¹² Ontario Arts Council, *ibid.*

¹³ Ottawa Arts Council, *ibid.*

July 2019, employment was down 27.6%, and working hours were down 44.2% for the performing arts and relevant sectors.¹⁴

Permanent Closures

While many organizations may be able to weather this storm, the impact on others will be permanent. Almost half of Ontario non-profit organizations, and the majority of Canadian independent music industry businesses, say they won't be able to sustain themselves beyond six months without further assistance.^{15 16}

The inability to pay rent due to short-term revenue loss has already forced some spaces to close, even if the organization could recover in the long term, and more spaces are likely to meet the same fate. In Toronto, almost half of small businesses fear they will be locked out over unpaid rent because of COVID.¹⁷

In Peterborough, downtown rental space and event studio Omorfia became the first local business to close as a result of the pandemic. As they stated on Facebook when they announced the closure, "It became clear that our business structure is not sustainable in these uncertain times. By the time we scraped it all together to stay afloat the second wave of this would just knock us back out all over again."

Nearly all Peterborough arts and culture organizations that EC3 has been in contact with have indicated paying rent is a primary concern during the pandemic. While the City has agreed to defer some rent payments, waivers are desperately needed. Some local landlords have negotiated rent relief, but such arrangements are tenuous and temporary.

Long-Term Impacts

Even as Ontario implements the first three stages in its reopening plans, the effects of the pandemic will continue to be felt.

¹⁴ Julien, Frederic, "Employment in arts and culture industries, July 2020," *Canadian Association for the Performing Arts (CAPACOA)*, August 17, 2020.

¹⁵ Ontario Nonprofit Network, *ibid.*

¹⁶ "The Canadian Music Industry Asks Federal Government For Urgent Relief for the Industry During COVID-19 Pandemic," Canadian Independent Music Association, April 1, 2020, <https://cimamusic.ca/news/recent-news/read,article/17804/the-canadian-music-industry-asks-federal-government-for-urgent-relief-for-the-industry-during-covid-19-pandemic>.

¹⁷ Manzocco, Natalia, "Almost half of Toronto businesses fear they will be locked out over unpaid rent," *NOW Magazine*, May 12, 2020.

Cancellation of the Summer Festival Season

Many artists and arts and culture organizations rely on the income provided by the summer season, where touring, tourism, and festivals are at their height, to sustain themselves through the year. Even if other touring opportunities and events returned to “normal” very shortly, the reduced slate of summer events will continue to impact these artists and organizations for the rest of the year. Should live music prohibitions in Ottawa continue through the end of September, musicians in that city expect to lose more than half of their annual income.¹⁸

Long-Term Audience Loss

It is very likely that performing arts venues will be among the last to reopen (compared to galleries and museums who can control crowd sizes for exhibitions), and even after they open, it will take some time for audiences to feel safe enough to return. One survey found that it will take most consumers a minimum of four months before they feel safe visiting a museum, and up to six months before they feel safe going to a concert, dance performance, or festival.¹⁹

This data is backed up locally: a survey conducted by a local performing arts venue indicated that only 10.7% of patrons would feel comfortable returning to the theatre immediately after opening, and 15.5% won't return until 2021.

Very early in the pandemic lockdown, another local organization EC3 spoke to worried that their 2020-21 season, slated to start in the fall, could be disrupted and it was cancelled. Another Peterborough performing arts venue said, “All programming until the end of April has been cancelled, and the more things develop, the more likely it looks like things will be on lock-down for far longer.... There is no hope of a vaccine for at least six months at best. All indications are that this sort of social distancing will have to be encouraged or even mandated by our governments to continue for a long-term period.” Many performing arts venues were in a constant process of cancelling and rebooking performers.

Audience Attrition, Retention, and Return

Enigma Research, Habo, and OAC/TAPA have all done surveys and reports on audience attrition and building confidence and trust to bring back audiences in a variety of circumstances.

¹⁸ Ottawa Arts Council, *ibid.*

¹⁹ “Quebecers and entertainment in times of COVID-19 (April 2020),” Habo, April 29, 2020, <https://habo.studio/entertainment-barometer-april-2020/>.

Environics' *COVID-19 Public Trust And Readiness Barometer: A Guide To Safely Re-Opening The Canadian Economy*, published in May 2020, is also very valuable. Staying in touch with audiences, providing alternative programming, working with health departments, model forecasting, and dealing with a rolling horizon on return dates are all reviewed here. Many organizations are undertaking their own surveys to test audience confidence and safety concerns.

Ongoing Economic Downturn

The economic downturn is likely to persist long after the province begins to reopen, meaning the hit to fundraising and sponsorship, as well as sales and other revenue sources, will persist as well.

In Peterborough, a survey conducted by a local performing arts facility indicated that 38% of patrons will be reducing their spending on tickets or donations due to the economic impact of the pandemic.

Reduced Capacity of Organizations

The forced layoffs during the pandemic, the reduced revenue, and the potential loss of volunteers and sources of private-sector revenue due to the global economic downturn will have significant long-term effects on these organizations. It will cause an immediate loss of institutional knowledge, and a reduction of capacity to provide programming and other services – which itself could result in further loss of revenue, leading to a downward spiral. Long-term audience attrition and the demands of rebuilding philanthropic and other support networks remain serious concerns.

Current Support Measures

Many artists and arts and culture organizations have benefitted from Canadian government programs put in place during the pandemic – in particular, the Canada Emergency Response Benefit (CERB), the Canada Employment Wage Subsidy (CEWS), and the Canada Emergency Business Account (CEBA).

However, many have fallen through the cracks. The April 15 expansion of the CERB to include seasonal workers, gig/contract economy artists, and creators making less than \$1,000 was both encouraging, and also a sign that large government programs will not always catch everyone

that needs support right out of the gate. The recent extension of CERB to the end of September and promised adjustments to Employment Insurance benefits to cover gig and contract workers will be essential and seem to be in process.

A survey by the Canada Council for the Arts found that 39% of respondents did not believe Canadian government measures would help them get through the crisis. “Along with the lack of long-term support measures,” states the report, “some respondents did not think the current measures put in place addressed their specific needs. Specifically, respondents said measures do not address the needs of smaller organizations, non-profits and universities, and receiving a loan [from CEBA] will not help organizations who are already struggling financially.”²⁰

Additionally, much of the early COVID-19 recovery funding provided by the Canada Council, OAC, and some Canadian Heritage programs were only available to those who were already clients. Many performing arts venues are not currently Canada Council or OAC clients, so the COVID-19 grant program supplements/enhancements and grant augmentations for existing clients did not make funds available to them. New OAC funding new funding from the Ontario Trillium Foundation, both announced in August, may help fill these gaps. The City of Peterborough has provided no financial support to recovery in the arts sector.

Resiliency and Stability

The lack of long-term stable support for the arts was also brought up as a point of concern in the same report by the Canada Council, and no government programs have as yet been announced to provide long-term assistance for artists or arts and culture organizations who will continue to struggle beyond the peak of the crisis. Stability in ongoing annual or multiyear operating funding is the single most important piece of the public funding puzzle in terms of ongoing recovery.

Financial Summary

The COVID-19 pandemic, and the ensuing lockdown, has had a profound impact on the health and sustainability of Canada’s artists and arts and culture organizations, cutting off essential sources of revenue and reducing donations and sponsorships. Particularly in the live performing arts, these impacts will be felt long after lockdowns are lifted. Beyond the

²⁰ Canada Council for the Arts, *National Survey on Federal Emergency Aid Measures and the Arts Sector in Canada* (Ottawa: Canada Council for the Arts, 2020).

cancellation of innumerable events and opportunities for cultural enrichment, this may result in layoffs and possibly permanent closures of organizations.

These effects will ripple out as well. Canada's arts and culture sector represents \$58.9 billion, or 2.8% of the nation's GDP – larger than agriculture, forestry, fishing and hunting, accommodation and food services, or utilities. The potential loss of a significant part of this sector could have profound impacts on the country.

As Ontario proceeds with Stage Three opening measures and new funding appears, there is some hope, but finding financially viable operating models with small audiences is challenging and grant writing fatigue for basic emergency needs is setting in.

Supports Needed

Ontario Non-profit Network, in their report on the impacts of COVID-19 on the non-profit sector, indicate three key areas of support that respondents said were necessary:

1. Emergency stabilization funding and bridge funding, to manage the short-term crisis and accommodate the period of adjustment that will follow;
2. Operating (fixed costs) expense relief, including rent support and mortgage support;
3. Worker and staff supports, including paid sick leave, top-ups for Employment Insurance, and extensions of unemployment benefits.²¹

Additionally, organizations report an urgent need for funding for:

1. PPE and health & safety signage
2. Renovations at front doors, box offices, in washrooms, back stage, stage doors, lobbies, bars and merchandising areas etc. (plexiglass, carpenters, designers, etc.)
3. Cleaning supplies and personal hygiene supplies and tools
4. Hiring additional staff and train staff and volunteers in COVID 19 safety measures
5. Collective marketing and communications campaigns to bring back audiences, as well as sponsors and patrons
6. Support for artistic production and curatorial activity responsive to the current conditions

Impacts and Needs from the EC3 Roundtables

²¹ Ontario Nonprofit Network, *ibid.*

Between May 11 and 13, EC3, working with Laridae Communications Inc., hosted a series of virtual roundtable discussions with leaders from local Peterborough arts and culture organizations, to discuss the challenges presented by COVID-19. Over 35 people attended across three roundtable discussions, which were broken down by discipline: Performing Arts (including theatre, dance, and professional venues); Visual and Media Arts; and Music and Literary Arts.

The following is a summary of the major points of discussion, put together by Laridae and EC3.

Performing Arts

- This group included primarily live performance arts, where audiences are key to the practice and the venues that showcase their work. The emotional impact of having had to cancel shows after years of planning and months of rehearsals was extremely significant.
- They see their road to future recovery as long and difficult, given the near-impossible task of maintaining social distancing with artistic and business models that require a “packed house” to achieve creative success and financial viability.
- Professional venues reported that they have been devastated by COVID-19. Significant layoffs and local contract cancellations, the likely loss of trained volunteers, paused capital campaigns that were in place to support needed refurbishments/renovations, and the cancellation of programming until at least Spring 2021 are all in play. Additionally, social distancing protocols will necessitate adjustments to physical infrastructure, new fixed costs, financial modelling, scenario planning and SF modelling, as well as creative modifications. All of these elements will somehow have to be overcome for venues to reopen. “Cashflow is a nightmare right now,” admitted one participant. “Our revenue has stopped, but our expenses continue.” Creative product in the pipeline is at risk.
- Professional artistic organizations financially supported by arts grants tended to be less immediately impacted by the shutdown, but have seen programming postponed or cancelled. They often have long lead times to mount a show. In terms of scenario planning for recovery, they are looking out one to two years or more for a “return to normal.” They expressed solidarity for the difficulties faced by the performance venues they rely on. “We need venues to survive.”
- Community-based and/or non-professional organizations that rely on volunteers, ticket sales, fundraising, sponsorships, and advertising revenue were impacted significantly

and saw the cancellation or deferment of programming. To varying degrees, depending on fixed costs, such as rent and salaries, they reported financial impacts. They too expressed solidarity for the difficulties faced by the performance venues they rely on.

- Some participants are currently focusing on scenario planning, looking at how to deliver live arts programs (i.e., small-size audiences to large ones, outdoor events, small scale one-on-one, pop ups events etc.). Others are looking to online options to bridge the gap—but this seems a less attractive option to most. One performance artist discussed the pressure to move “everything online,” which they did not see as a solution. The core of this participants’ work is “bringing people together physically in a space.” “Live performance is our business.”
- One participant noted that young and/or marginalized artists in particular have been hit hard.
- “We will survive until January if we’re lucky,” said one community theatre participant. “But I’m not that optimistic about having a willing audience in January. Everyone’s spirits are down. It’s very disappointing and people feel frustrated and sad.”
- Another noted that community theatre is where many young people first get their start. It’s also where people dedicate countless volunteer hours. While not professional working artists, we provide an important “artistic outlet” for many. So, whether amateur or professional, making art happen is about mental health, purpose, connection, and community building and vitality.
- One artist noted that all is “very up and down – some days are good and some the opposite.” As a performing artist, they noted that they have lost significant revenue, but that they have continued to teach (virtual) kids’ classes. They expressed interest in creating more classes.
- Some First Friday events may come back sooner
- One artist has a residency with a local social services organization, providing community-engaged arts programming to help clients retell their story and be empowered. They have postponed the program and are trying to move it to virtual, but many participants don’t have (consistent) internet access and not all are in safe homes.
- “We had hoped that by April [audience members] can come into the space without a worry. I am most concerned about the venues – they are in desperate straits.” The participant shared that they are thinking about fundraising for the venues in the spring.
- A participant representing a First Nation’s organization noted that their first ever festival was scheduled for June, but has been postponed a year. Most of the artists have agreed

to be a part of next year's festival, and they are trying to do some online activities in partnership with the Indigenous Performing Arts Alliance. They received funding for a gala, which is being moved to an online event. The participant shared the challenge of telling artists that the event isn't going ahead this year.

Visual and Media Arts

- Typically crowded fundraising events, exhibition openings, and performances are all essential components of how local organizations produce and present their artistic work and stay "in business." These all are, and will continue to be, significantly impacted by social distancing and other health guideline restrictions. The loss/diminishment of these events has meant significant, immediate and ongoing loss of many forms of revenue, resulting in significant income shortfalls for several organizations. Emergency Measures, including closures across the province, has had a negative impact on "in - person" audience relationships since mid-March.
- It was noted that during the first week of COVID-19 pandemic responses, in March, "a lot was up in the air," as most were trying to focus on sustainability, human resources, and supporting people (i.e., remote working/addressing some gaps in learning). Uncertainty
- By April, most participants described situations where programming had been cancelled, postponed, or, in a few cases, moved online, at least to some extent.
- The capacity to produce content or offer programming from home, via an online platform, was mixed—some were able to find alternative ways of "offering something" while others simply went into programming hiatus.
- Some organizations have long lead times for programming and have annual funding cycles. Due to timing, they were less immediately affected by a loss of grant income. Others felt significant and direct repercussions of the lockdown, suffering programming and financial losses from which they may not be able to recover.
- Several participants shared the sentiment of one who said: "We are in survival mode." They noted that as a community-based organization with no paid staff, they still had fixed costs and now had no income. They were not eligible for federal funding and, as a result, were negotiating with landlords, insurance companies, and others for relief options. Nerve racking, time consuming skills. Many reported a sensation of "flying the airplane" and building it at the same time
- Organizations that are primarily funded through arts grants tended to have more time and flexibility to plan for recovery. Those where most, or all, income comes from ticket

sales, lessons or training fees, and/or fundraising and sponsorships saw the most immediate financial impact.

- Individual artists and arts workers noted that exhibition and performances were cancelled as a result of COVID-19 and that the financial impacts ranged from moderate to significant, depending on the situation.
- One participant noted: “I’m concerned about the general survival of the arts community in the City. It is definitely very fragile at this point.... I’m also concerned about the rush to just digitalize everything ... I see this as a huge opportunity to step back and redefine the arts in society.”
- Significant reduction in fundraising capacity is a crucial outcome of the current circumstances. A participant spoke to the impact of the lockdown on fundraising events and third-party fundraisers (e.g., Delta Bingo) which have been cancelled or postponed. They are exploring the possibility of moving the fundraisers online, but also cited a “crowding” and a “tiring” of people being forced into this online space for all things work and recreation alike.
- Another participant explained that their main source of revenue was teaching classes—
- which have been postponed and/or cancelled. Their biggest problem is how to get these up and running again after COVID-19. It is going to have a significant impact on their revenue. Some classes are now up and running again.
- Several organizations are looking at the logistics to set up an online store and are using social media to encourage their members/volunteers to connect with one another and/or purchase gift certificates.
- In various ways, participants questioned what kind of disposable income the public will have now, and into the future, to buy art?

Music and Literary Arts

- This group also expressed extreme dismay at the impacts of COVID-19 on their practice, particularly audience-focussed musical groups. Literary producers were less impacted, but writers identifies losses in terms of book launches, readings and fundraising gatherings.
- Several participants described planning as being on hold, and that instead they are focussed on going out to subscribers and donors with a strong direct appeal for financial support. Others suggested that they were engaged in scenario planning but faced many unknowns.

- Those with office and administrative costs have “cut them to the bone” to make sure they can survive.
- There are efforts to reach out and continue to engage their audience, donors, the City, and beyond, through social media and via video performances—although there was consensus that it’s simply “not the same” or that “singing on Zoom is a disaster and a big disappointment on the musical front as there are many artistic limitations.”
- All participants agreed that social connections remain key to the success of their arts organizations, and they are focused on what they can do with their relationships (e.g. calling all donors, keeping volunteers connected with one another).
- One participating social service agency that uses the arts as part of its service delivery is continuing to collaborate with artists, and is working on writing new grant applications. The participant noted that they were initially worried about reaching out to their donors and funders to support this work; however, they feel that they seem to be receptive.
- One participating writer shared that producing new work is difficult for many writers at the moment, but that focussing on broader aspects of their artistic practise is possible. Cancellations of book launches are difficult because it can take a writer many years to produce a work, and it’s only “new” for such a short time under normal circumstances—to have lost that launch time is very difficult.
- A musician, spoke to the difficulty of having a summer tour cancelled, as this is the source of much of their income when launching a new project or to see them through a longer period with fewer gigs.. They also noted that performance venues in Peterborough are already limited and, if they are unable to rebound, this adds additional financial pressure to local working musicians.
- Another participant, representing a larger festival-based organization, spoke to the ways in which the arts are important as an economic driver, bringing in tourists into the downtown and the region.

Overall Challenges

- Silos are causing challenges and collaboration is/will be needed. In addition, it was acknowledged that “we are all going to be going ‘to the same well’ (for audiences, donors, grants, sponsorships).”
- Participants noted that when grants and funding become available, accessing this information is a pressing issue. They noted that EC3 has been very good at sharing this information and knowledge.

- “We’ll need help in areas such as marketing, media support, and collaboration with others.”
- All felt strongly that finding ways to ensure our local venues survive and rebound is essential as was supporting the development of creative content
- Participants spoke to the challenges of facilitating social distancing among audience members / attendees / performers / players in a way that is financially viable. One participant expanded on this, noting that even if they could reopen with limited capacity (i.e., 25% of “full”), there are two significant issues:
 - A crowd is part of what makes a performance exciting, and low audience numbers would impact the how the performance is experienced.
 - It would not be financially feasible, noting that profit margins are very low for even a highly successful production and limiting the audience would not cover the costs without “an exorbitant amount of special funding to offset it.” Additionally, it was noted that additional staff would be required to ensure a safe space for the audience.
- Concerns about maintaining relationships with volunteers during this downtime – and having to bring them back online with new protocols to make the audience safe and comfortable.
- One participant said: “The big issue will be, if spaces are allowed to open, will the public feel safe to even go there? We need guidelines around what safely opening looks like.” Another agreed, adding: “Is anyone going to come back to see live performances after this? If so, how long will it take them? And how large can these groups be? What does this look like?” Finally, a third said: “A lot of us have spent years creating an audience, a profile, a presence. That’s pretty much gone now at this point. How are we going to stay known?”
- One participant expressed a need for a marketing campaign (when the time is right) that is focused around the message of: “Yes, we are safe. Come on in.”
- Another participant noted that venues are not just the actual buildings, but also the people who work there: the technicians, custodial staff, management, and the artists that rely on them. All of this needs to be intact when we re-open.
- Several participants felt strongly that the way the City perceives the arts community, and allocates funding, is very dated. This could be an opportunity for the City to readjust and allow EC3 to take a stronger leadership role.
- “A big piece of what’s being talked about is the challenge for everyone around mental health. Such a huge role that the arts plays is to support the mental health of the

community. This is also why it's critical for cities to recognize what the arts does for the community.”

Conclusion

The arts and culture sector needs a recovery plan that is well funded and responds to both the short- and long-term needs of Peterborough arts organizations and artists. Advocacy work must continue to ensure that recovery programs are open to all not-for-profit arts and culture organizations in the city, and that both individual artists and groups in every discipline have strong support in the recovery as well as the stabilization phase.

The list of resources in Appendix A provides a solid foundation of information for leadership initiatives and decision making.

Appendix A: Surveys and Studies

The following lists many COVID-19 impact surveys and studies relevant to the arts and culture sector.

Some surveys are still ongoing, or have not publicly released results. Links are provided for final reports wherever possible.

Surveys by National Arts Organizations

Alliance of Canadian Cinema, Television and Radio Artists (ACTRA)

ACTRA Health & Safety Survey

June 2020

<https://www.actra.ca/resources/health-safety-survey/>

Artist Run Centres of Canada

COVID-19 Impact on artists, self-employed workers, and freelancers

May 13, 2020

<http://www.arca.art/en/resources/3029/>

Business/Arts

Arts Response Tracking Study

May 2020

<http://www.businessandarts.org/resources/arts-response-tracking-study/>

Canadian Arts Coalition

Canadian Arts Coalition Survey points to Slow Recovery

July 13, 2020

<https://www.canadianartscoalition.com/canadian-arts-coalition-survey-points-to-slow-recovery/>

Canadian Association for the Performing Arts (CAPACOA)

August 17, 2020: Employment in arts and culture industries, July 2020

<https://capacoa.ca/en/2020/08/employment-in-arts-and-culture-july-2020/>

July 14, 2020: Artists and cultural workers still among most impacted by the COVID outbreak

<https://capacoa.ca/en/2020/07/artists-among-most-impacted-by-the-covid-outbreak/>

July 23, 2020: Employment in arts and culture industries, June 2020

<https://capacoa.ca/en/2020/07/employment-in-arts-and-culture-june-2020/>

May 12, 2020: Agents and Managers Industry Survey of the Effects of Covid-19 in Canada

<https://capacoa.ca/en/2020/05/agents-and-managers-industry-survey-of-the-effects-of-covid-19-in-canada/>

May 2, 2020: Arts and entertainment among the most impacted by the COVID-19

<https://capacoa.ca/en/2020/05/arts-and-entertainment-among-most-impacted-by-covid-19/>

Canada Council for the Arts

Input on measures to off-set impacts on arts sector of COVID-19

May 11, 2020

<https://canadacouncil.ca/research/april-2020-covid19-client-survey>

Canadian Event Industry Crisis

Canadian Entertainment Industry COVID-19 Impact Study

[ongoing]

<https://www.canadahelps.events/impact-study>

Canadian Independent Music Association

The Canadian Music Industry Asks Federal Government for Urgent Relief for the Industry During Covid-19 Pandemic

April 1, 2020

<https://cimamusic.ca/news/recent-news/read.article/17804/the-canadian-music-industry-asks-federal-government-for-urgent-relief-for-the-industry-during-covid-19-pandemic> [article includes survey results]

Canadian Media Fund

COVID-19 Production Industry Taskforce Survey

[no results published]

<https://cmf-fmc.ca/en-ca/news-events/news/march-2020/covid-19-production-industry-taskforce-survey>

Canadian Music Publishers of Canada

COVID-19 Impact Analysis

April 8, 2020

https://www.nordicity.com/de/cache/work/143/Nordicity_CMPA-COVID-19-Impact-Analysis.pdf

Choral Canada

COVID-19 Impact Survey on Canadian Choirs

April 14, 2020

https://www.choralcanada.org/uploads/3/8/9/2/38921071/covid-19_survey_responses___analysis_summary.pdf

Documentary Organization of Canada

Understanding the Impacts of C-19 on Canada's Documentary Community

June 3, 2020

https://www.docorg.ca/covid_19_impact_survey

International Alliance of Theatrical Stage Employees (IATSE) Canada

Canadian Entertainment Workers: Lost Work Survey

[still ongoing]

<https://iatsecanada.net/lost-work-survey>

I Lost My Gig Canada

Impacts of COVID-19 on Canadian Artists and Independent Cultural Workers

June 1, 2020

<https://hillstrategies.com/resource/i-lost-my-gig-canada/>

Music Canada/ Abacus Data

Crowded Out: What Canada's professional musicians say the impact of the pandemic has been on their lives, art, and, work.

July 16, 2020

<https://abacusdata.ca/crowded-out-musicians-live-performances-covid19-pandemic/>

Music Canada / CONNECT Music Licensing

COVID-19 Artist Impact Survey

April 23, 2020

<https://musiccanada.com/news/covid-19-continues-to-hit-the-music-industrys-most-vulnerable-music-canada-survey/>

Naheyawin

COVID-19 Impact Survey for Indigenous Artists and Cultural Practicioners

[still ongoing]

<https://form.jotform.com/200737169441253>

Orchestras Canada

Implications of COVID-19 for Canadian Orchestras

March 27, 2020

<https://oc.ca/wp-content/uploads/2020/03/Implications-of-COVID-19-for-Canadian-Orchestras.pdf>

Professional Association of Canadian Theatres (PACT)

COVID-19 Impact on Cultural Sector

[no results available]

<https://docs.google.com/forms/d/e/1FAIpQLSeVU9XuBy-9ZgeBnuP781Z9RfYswY0LVDMvxEy-8YHIkMMdcA/closedform>

Writers Union of Canada

Economic Impact of COVID-19

[no results published]

<https://www.writersunion.ca/economic-impact-covid-19>

Surveys by Ontario Organizations

Ontario Arts Council

Early COVID-19 Impacts on OAC-Funded Arts Organizations

May 6, 2020

<https://www.arts.on.ca/news-resources/updates,-faqs-and-resources/2020/covid-19-update-for-may-6,-2020>

Ontario Association of Art Galleries

Arts Service Organizations COVID-19 Impact Survey Results

April 14, 2020

<https://response.oaag.org/arts-service-organizations-covid-19-impact-survey-results/>

Ontario Nonprofit Network

The state of the Ontario nonprofit sector three months into the COVID-19 crisis

August, 2020

<https://theonn.ca/our-work/covid-survey-2020/>

Municipal Surveys

City of Brampton

Arts and Culture Sector Impact Survey

[still ongoing]

[https://forms.office.com/Pages/ResponsePage.aspx?](https://forms.office.com/Pages/ResponsePage.aspx?id=sulJsveh6kSUxTwJwlLhUZzww7WljXhGjlwlGHp4A2tUQUM4NjRCVkpRTU5OV1hKWjhFUTk1TjJQNS4u)

[id=sulJsveh6kSUxTwJwlLhUZzww7WljXhGjlwlGHp4A2tUQUM4NjRCVkpRTU5OV1hKWjhFUTk1TjJQNS4u](https://forms.office.com/Pages/ResponsePage.aspx?id=sulJsveh6kSUxTwJwlLhUZzww7WljXhGjlwlGHp4A2tUQUM4NjRCVkpRTU5OV1hKWjhFUTk1TjJQNS4u)

Culture Montreal

COVID-19 et le secteur culturel (individus / organismes et entreprises culturels)

April 2020

<https://culturemontreal.ca/grand-dossier/covid-19/>

Greater Vancouver Professional Theatre Artists

June 1, 2020

COVID-19 Survey

https://www.gvpta.ca/covid19_survey/

Mississauga Arts Council

COVID vs the Arts

[no results published]

<https://www.surveymonkey.com/r/MACCCOVID-19VSARTS>

Ottawa Arts Council

COVID-19 and Direct Impact on our Community

Understanding the Financial Impact of Covid-19—Looking Forward

[no results released publicly]

<https://www.ottawaartscouncil.ca/whats-on/covid-impact-surveys>

Toronto Alliance for the Performing Arts (TAPA)

TAPA COVID-19 Virus Impact Survey Results

March 26, 2020

<https://tapa.ca/tapa-covid-19-virus-impact-survey-results/>

Winnipeg Arts Council

Impact of the Pandemic on the Arts Community study

[no results published]

<http://winnipegarts.ca/wac/news-article/covid-19-update>

Local Peterborough Surveys

Artspace

Artspace Reopening Survey

[ongoing]

<https://docs.google.com/forms/d/e/1FAIpQLScYMnIQQi-2eIwsuAUpliY9Ne7HvEAUe5fPJ1AWugr0vvHGvw/viewform?fbclid=IwAR0ySirAkj1anhGSgR42i7IOqZPU7sJiTapnrREJ71TEbryWfNkkIVI1fbo>

Art Gallery of Peterborough

AGP Reopening Survey

[no results available]

<https://www.surveymonkey.com/r/RYGT3QK?fbclid=IwAR1tzkEdedjj2w3pbm0HfGHAvuFcVbYiMLZzhxhGlxq65Bu1-j3ZqDWbHQ4>

Audience Surveys

Colleen Dilenschneider

How COVID-19 is Impacting Intentions to Visit Cultural Entities

July 27, 2020 [latest update]

<https://www.colleendilen.com/2020/07/27/how-covid-19-is-impacting-intentions-to-visit-cultural-entities-july-27-2020/>

Enigma Research

Return to Live Events Survey

April 2020

<https://enigmaresearch.com/return-to-live-events-survey/>

Environics Research

COVID-19 Public Trust And Readiness Barometer: A Guide To Safely Re-Opening The Canadian Economy

May 2020

<https://environicsresearch.com/insights/covid-19-public-trust-barometer-guide-safely-opening-canadian-economy-ed1/>

<https://environicsresearch.com/wp-content/uploads/2020/05/COVID-19-Public-Trust-Readiness-Environics-Research-2020-FINAL-COMPRESSED.pdf>

Habo

Quebecers and entertainment in times of COVID-19 (edition 1, April 2020)

April 29, 2020

<https://habo.studio/entertainment-barometer-april-2020/>

Léger 360

Les Québécois seront prudent et lentis avant d'entrer à nouveau dans une salle de spectacles

April 30, 2020

<https://associationrideau.ca/fr/actualite/nouvelles/les-quebecois-seront-prudents-et-lents-avant-dentrer-a-nouveau-dans-une-salle-de-spectacles>

Music Canada/Abacus

As the pandemic goes on, the threat to live music grows

August 10

<https://abacusdata.ca/live-music-threat-pandemic-music-canada/>

Ontario Arts Council/Toronto Alliance for the Performing Arts (TAPA)

COVID-19 Audience Outlook Monitor survey in Ontario.

June 15, 2020

<https://www.audienceoutlookmonitor.com/ontario-arts-council>