



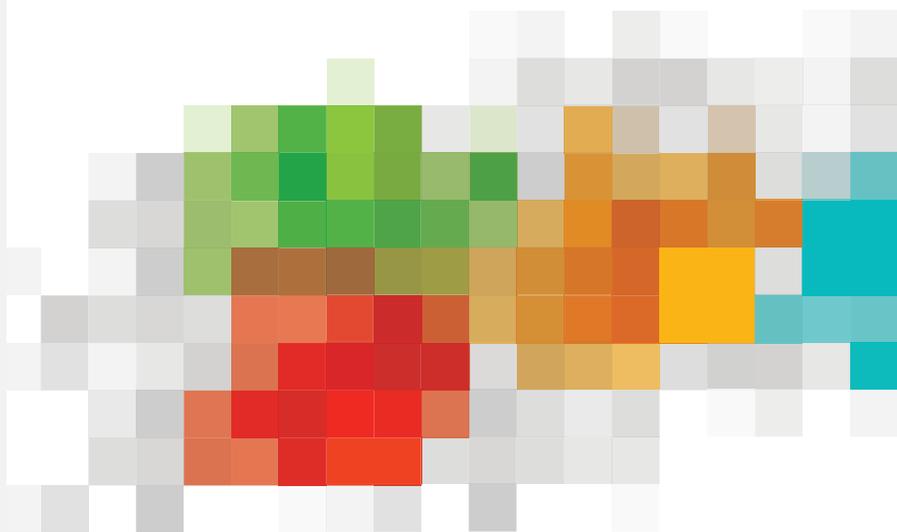
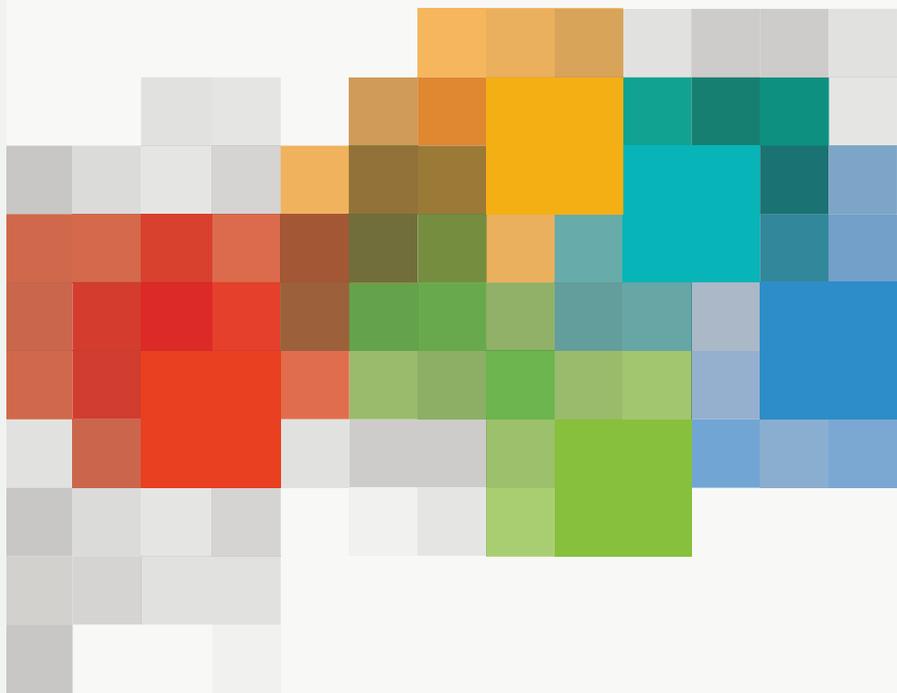
**2020 Arts, Culture
& Creative Industries**

COVID-19 Impact Survey



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Summary



This report is designed to help survey partners advocate for support and demonstrate the importance of the arts and culture industry. It is also designed to inform The City of Calgary, Calgary Arts Development, and Calgary Economic Development as they consider which scenarios will best support the sector through these unprecedented times.

In May 2020 Calgary Arts Development, in partnership with Calgary Economic Development, The City of Calgary, and the Rozsa Foundation, undertook a survey of arts organizations in Calgary to better understand and plan for the COVID-19 disruption to Calgary's arts, culture, and creative industries communities. A total of 140 organizations responded that the primary mandate of their organization is related to arts and culture.

The timing of this survey in the field meant that Alberta was just reopening in Phase 1, which meant galleries and museums were opening with limited instructions on how to do so safely. Phase 2, which included theatres, had more guidance on reopening but had not been announced at the time this survey was in the field. Concern about the lack of information at the time regarding timing of phases and guidance on reopening is reflected in survey results.

Over 1/3 (38%) of organizations report that the majority of their activity takes place in a single month. These are most often organizations producing festivals and events. There were a few non-arts organizations producing festivals and events that completed the survey that are not represented in this report. In analyzing those additional responses, their results mirrored the results of the organizations being reported on here, including reporting staff, programing, and artistic disruptions, as well as in their perceptions of the future.

This report is designed to help survey partners advocate for support and demonstrate the importance of the arts and culture industry. It is also designed to inform The City of Calgary, Calgary Arts Development, and Calgary Economic Development as they consider which scenarios will best support the sector through these unprecedented times.

Words like *struggling*, *worry*, *fear*, and *disconcerting* characterize the emotions organizations are feeling right now. These feelings are reflected by how organizations are dealing financially, programmatically, and structurally in their response to COVID-19.

Despite phased openings in Alberta, there continue to be many questions from organizations on how to apply the guidelines or if the guidelines will allow them to operate in a financially feasible manner. The level of uncertainty on how long physical distancing measures will be in place and if there will be another wave all continue to weigh on the minds of arts leaders as they plan for scenarios. The range of need is vast from immediate survival to mid-term support as the arts adapt and pivot to the new realities facing the

The key areas highlighted in the survey demonstrate the scope of the COVID-19 impact as outlined below:



Organizational Fragility

Almost half of all organizations (47%) responded that they will have to cease operations in the next six to 12 months if current conditions persist. As organizations also respond that they are unlikely to resume full programming over the next 12 months, it puts that 47% of organizations into the situation of having to consider whether or not they will survive this disruption.



Cancelled Programming

Most organizations are reporting that they have cancelled or postponed performances and exhibits (88%) as well as workshops and conferences (78%). Less than a quarter (23%) of organizations have found a way to modify existing programming to continue under existing conditions. A total of 6,339 events in total have been reported as cancelled that would have taken place between March 15 and August 31, 2020.

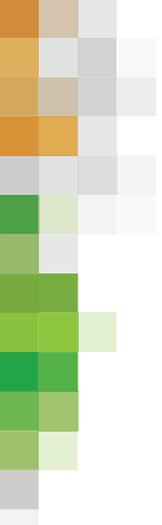


Program Cancellation Impact on Artists

Tied to the inability to produce programming is the result that organizations will be hiring fewer artists. Organizations reported that they were originally planning on hiring 4,274 artists between March 15 and August 31, 2020 that number has been reduced to 795, an 81% reduction in the number of artists being hired.

Even the popular statistics website *fivethirtyeight* has identified the challenges some artists are facing at this time.¹ Many artists have found themselves unable to access existing emergency support mechanisms governments have created because of the way the gig economy works. Early after the Canadian Emergency Response Benefit (CERB) was unveiled by the Canadian Government, artists began to reach out to Calgary Arts Development with concerns that accepting even small compensation for what little opportunity they had remaining to perform would then make them ineligible for CERB benefits.

1. <http://fivethirtyeight.com/features/musicians-are-suffering-without-concerts-to-play/>

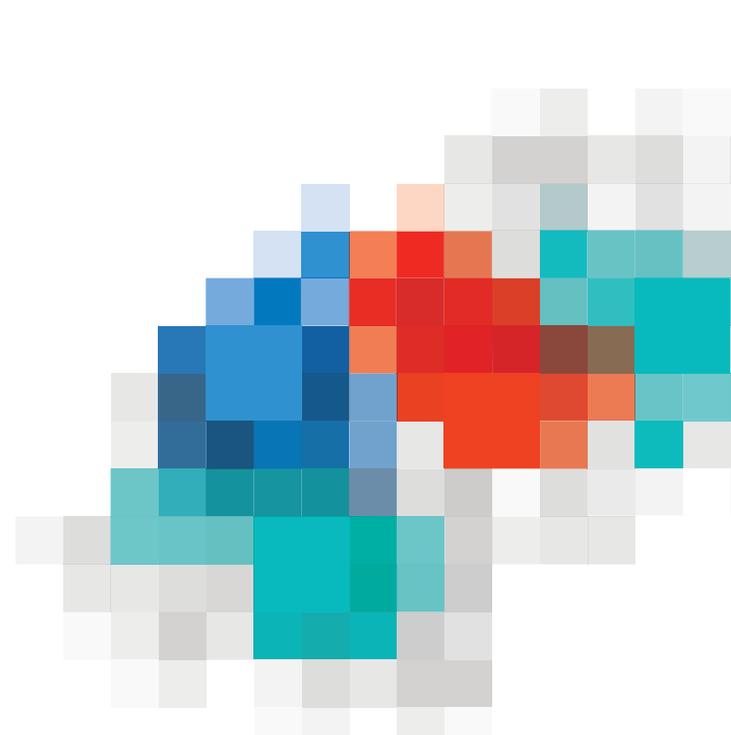


Artists were already in a precarious situation before the loss of these opportunities. Most Calgary artists were already earning low individual and household incomes. Gender and ethnicity further impact financial precariousness. Recent statistics from the Center for Disease Control indicate that racial and ethnic minorities in the United States face a disproportionate number of illness and deaths from COVID-19². For those artists whose ethnic identity is related to earning a lower income as an artist, the health crisis also disproportionately affecting their community is that much more problematic.

■
Revenue Impact

Lost revenue in the current fiscal year, just from the 140 organizational respondents, is anticipated to be over \$20.6M. When asked to rank the impact of COVID-19 on their organizations financially, 84% described the impact as significant or major. 7% described the impact as so significant that they may not recover. There are conversations in the sector on how to monetize online content to generate revenue but there is still much to learn to see what is viable as there is a sense of online fatigue and audiences' desire to gather socially again in person is uncertain.

It is important to consider that the \$20.6M in lost revenue is only the amount reported by the 140 survey respondents who were able to complete this survey. There are over 300 non-profit arts organizations in Calgary, so the losses are likely significantly higher. With many organizations no longer having any staff at all, they were not able to answer the survey to report on what their losses have been.³



■
Job Losses

Total staffing levels in reporting organizations was 1,525 positions in February, which dropped 53% to 715 positions in May. 14 organizations that previously reported having staff in 2019 now report having no staff at all. The longer organizations are forced to exist without any staff, the more difficult it will be to reopen. It will also be more likely that staff leave the sector or relocate to locations where they are able to find work, also making staffing organizations in the future difficult.

■
2019 Versus 2020 Attendance

The reduction in programming has resulted in a corresponding drop in expected audience sizes. Organizations are expecting an unprecedented 54% drop in attendance from 4,069,503 total attendees in 2019 to 1,856,891 total attendees in 2020.

2. <https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/racial-ethnic-minorities.html>
3. <https://www.stone-olafson.com/thenewexperienceconomy>




Confidence in Ability to Program

Confidence remains very low that programming will return anytime soon. When asked for confidence level in timing of reinitiating programming, the majority (64%) of organizations feel confident or extremely confident they will produce content on or after Q3 of 2021 (July to September). Through the rest of 2020 a majority of organizations report that they are either not confident at all or only slightly confident that they can produce any programming.



Perceptions of the Arts

Respondents largely anticipate the performance of arts and culture organizations will mirror that of the local and national economy. Organizations responded that they anticipate other arts organizations in a similar artistic discipline locally will be in a worse position in a year (85%), and that the arts locally in general will be in a worse position in a year (89%).



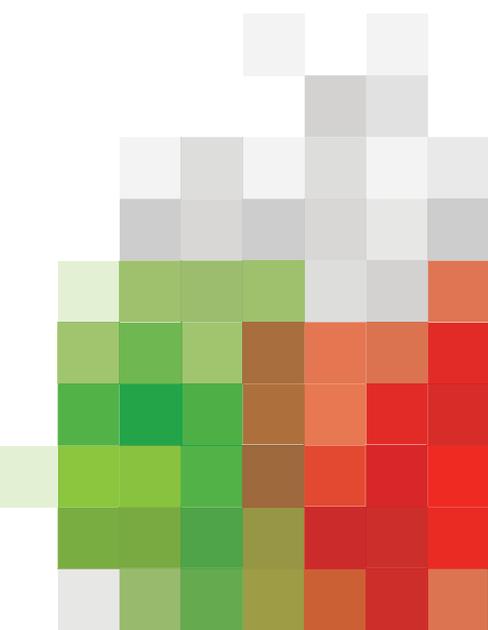
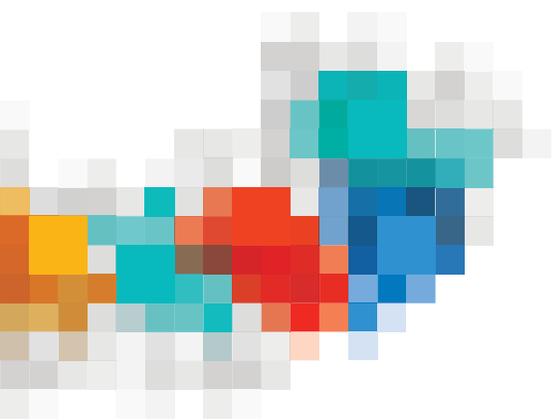
Perceptions of the Economy

When asked about perceptions of how the economy will be faring over the next year, respondents are more pessimistic the closer to home the geography gets. While 75% of respondents think the Canadian economy will get worse over the next year, that number rises to 85% when asked about the prospects of the local economy. This is a much more pessimistic view than Calgary business leaders in general have, where 52% think the overall local economy will get worse, and 50% think the Canadian economy will get worse over the next year.⁴ While not all other business sectors rely on gathering large crowds of people to generate revenue, the need for that in the arts may have a dampening effect on arts respondents.



What's Needed to Survive 2020 and 2021

Arts organizations identified the most critical factors for success in both the remainder of 2020 and then 2021. In both cases, the only factors that received more than 50% of comments were the need for community support and engagement, followed by grant funding.



4. "Calgary Business Leaders Market Perceptions" Calgary Economic Development, April 2020

What's Next

The findings of the survey demonstrate that the need for support will be deep and prolonged. The government support provided is helping but there needs to be continued and sustained support that invests in the sector's ability to adapt to the uncertainty, especially if COVID-19 remains a going concern for more than six months. The support of community and government grants is essential to ensuring that there is a vibrant arts sector in Calgary when we re-emerge post-COVID-19.

The Information Gap

While information collected in this survey helps build an understanding of where support may be needed, it is insufficient to fully prepare for ensuring the survival and recovery of the arts sector in Calgary. There is a gap in knowledge, as never before has the local sector been disrupted in this way and for this amount of time. As devastating as the 2013 floods in Calgary were, that disaster affected some more than others, with many arts organizations that are located further away from the river able to function.

Occasional organizational surveys will continue to be conducted to understand the continued impact on staffing, finances, programming, and the ability to pivot to online programming. As funders are able to support costs associated with near-term survival, organizations can spend more time thinking and sharing their needs when reopening.

Dance Magazine recently posed the question "Has Anyone Asked Artists What They Need?"⁵

This survey makes clear the pressing need to understand the issues and concerns of individual artists and other arts professionals. The results of this survey revealed hundreds of staff positions lost and thousands of paid artist opportunities gone.

Emergency support for artists provided by Calgary Arts Development revealed gaps in the existing system pre-COVID-19. These gaps include the lack of professional conditions artists have to work under that have left them vulnerable when required to prove income when no contracts were ever provided for their work. The next iteration of the Calgary Arts Professionals survey will be released earlier than originally planned with a focus on understanding the current and expected living and working conditions of artists in Calgary. There will be a focus on the impacts of COVID-19, better understanding the gaps that have been exposed in the system, and a greater focus on understanding what inequities exist.

5. <https://www.dancemagazine.com/support-artists-2645970673.html>

It will also be important to understand the impact on physical venues of all types. While arts organizations re-imagine the relationship between performers, audiences, and space, we will need to understand if existing infrastructure can support that and, if not, what new resources will be needed.⁶

Though complete guidelines for most spaces have not been released, and it is unlikely we will know any time soon how long the current guidelines will need to be in place, arts organizations will need spaces to use when they do return. It may not even be feasible to open

Support for Survival

Funding organizations will need to focus on both their short-term survival as well as the long-term recovery of the sector. Calgary Arts Development has supported organizations in financial peril with both funding and technical support. Further investigation will be done to understand organizational liquidity in the arts sector.

The loss of revenues is far greater than any government support is able to cover so there is an opportunity for the sector to re-imagine how they engage with their communities, how they present their art, and how they sustain their operations. The unknown length of the pandemic layers on additional challenges on how to best plan for these adaptations and how to best recover at least some of the revenue losses.

spaces like theatres at half capacity. While Calgary Arts Development maintains information on the existence and use of spaces⁷, we will need to better understand their financial operations. Reporting on the physical infrastructure that support arts and culture programming will need to be completed in the near term.

Calgary company Stone-Olafson has begun a longitudinal study to gather information about public perceptions regarding event attendance. This information should inform the work organizations and funders are planning, and can be followed at *The New Experience Economy* website.⁸

The BYP Group has recently released a comprehensive overview of how governments across the globe have begun supporting arts and culture organizations through the COVID-19 disruption, and have identified best practices for support:⁹

- » Money (preferably lots, and with the possibility of more), targeted at the arts and creative industries across the supply and demand value chain (educators, independents, institutions, meditators, critics, curators, distributors, presenters, etc.).
- » Support for the self-employed and freelancers.
- » Direct support without paperwork.
- » Digital and other programs that work with the current environment.
- » Support the public to access arts and culture during lockdown.

6. <https://www.vulture.com/2020/05/what-socially-distanced-live-performance-might-look-like.html>

7. <https://calgaryartsdevelopment.com/resources/spaces/>

8. <https://www.stone-olafson.com/thenewexperienceeconomy>

9. <https://www.bypgroup.com/blog/2020/3/21/government-arts-responses-to-covid-19>

Support for Recovery

While organizations focus on survival, it is important to plan for recovery. With some organizations losing their entire staff, some boards that have previously been governance focused may need to take on a variety of operational tasks.

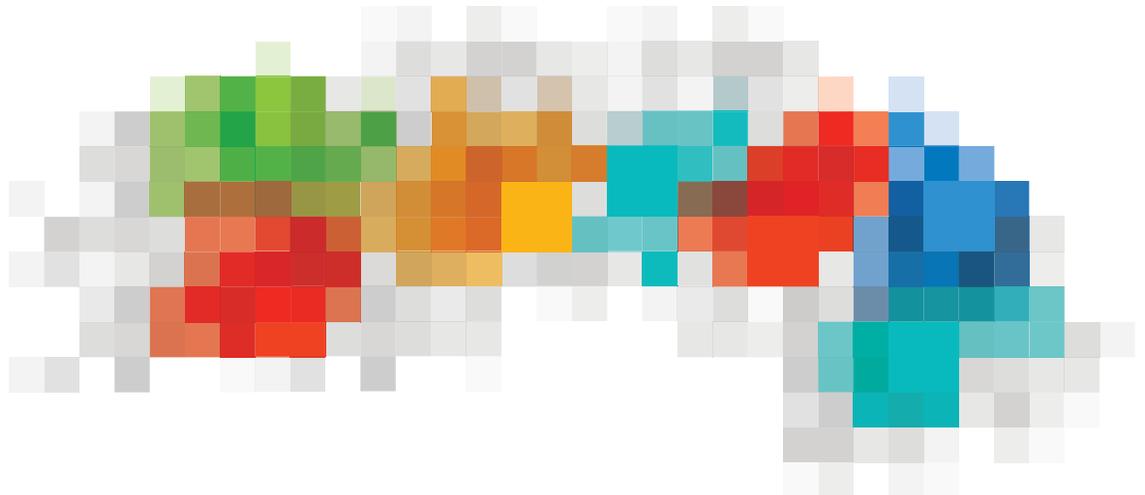
In the near term we don't yet know how many artists and staff may leave the sector or region permanently while unemployed. A recent study of musicians found 20% may choose never to return to their career.¹⁰ We likely won't know what gaps in adequate staffing in the recovery phase may exist until closer to when organizations begin operationalizing plans for reopening.

Calgary Economic Development is already thinking about what tools will be needed to help the private sector with requiring talent that can support organizations as they recover. Similar tools are needed in the arts, culture, and creative industries when the arts sector reopens as well.

Organizations are reporting a wide variety of challenges they will face when reopening. Guidelines for reopening, or the lack of guidelines, will look different for each organization when put into practice. Organizations working in different disciplines, sizes, scales, and serving different audiences will each face their own challenges and need a one-size-fits-one solution when recovering.

While almost all organizations are reporting a negative impact from COVID-19 in some way, it will be important when planning relief funding to acknowledge that there are other factors that will influence an organization's ability to function. Traditional support from the private sector is going to be dampened both from COVID-19 impacts but also the continuation of historically low oil prices.

To ensure a successful recovery, funders will need to focus on both the survival of organizations as well as the artists and arts workers that allow organizations to fulfill their mandates. Funders may also need to invest in the development of health protocols specific to the arts—an area of support rarely, if ever, seen in Calgary.



10. <https://www.artspromotional.co.uk/news/one-five-musicians-may-not-return-their-career-research-finds>

Equity, Diversity, Inclusion, and Accessibility

For every achievement made—such as the residency of Making Treaty 7, the work of First Nations/Métis/Inuit artists supported through the Original Peoples Investment Program, the founding of the Immigrant Council for Arts Innovation, and more—there continue to be barriers that must be overcome. These barriers stem from structural racism and discrimination: inequalities in access, in space and resources, etc.

These barriers and inequities are compounded by current COVID-19 conditions. Especially now, during this new time, a pivot is necessary to galvanize a more equitable future. Then visible minorities—especially Black or Indigenous people—are not symbolized as being perpetually in need, and only as a part of the discussion when there is a need for equity. Real achievements are being made in Calgary, though structural inequality limits the heights of those successes.

Intersectionality—the ways individuals get categorized by things such as race, class, and gender to create overlapping systems of disadvantages—is a critical concept in understanding the work that needs to be done to recover from the COVID-19 disruption. Many are concerned that recent yet insufficient gains in advancing equity in the arts will be lost during this crisis.¹¹

Calgary Arts Development recognizes that current funding models have been based on a colonial system of granting¹², and the goal of recovery is not to return to a previously inequitable system.¹³

We will not move towards Reconciliation, ensure the recognition that Black Lives Matter, or make progress in any other measure of equality when trying to return to an inequitable ableist “normal” that excluded many.

Even this report is written with a focus on Western forms of knowledge, when we are trying to expand our research capabilities at Calgary Arts Development to include ways of knowing previously marginalized.

Inequity exists both at the organizational and individual level. Previous Calgary Arts Development studies show gender and ethnicity further impact the financial precariousness of individuals.

Recent statistics from the Center for Disease Control indicate that racial and ethnic minorities face a disproportionate number of illness and deaths from COVID-19.¹⁴ Disabled arts professionals report real concerns¹⁵ both under working conditions organizations have implemented now as well as what conditions will be like when organizations attempt to recover.

A movement towards resilience in the arts at this time will only be successful if centered on the core goal of creating an equitable arts ecosystem.

11. <https://hyperallergic.com/556290/in-memoriam-of-the-art-worlds-romance-with-diversity>

12. <https://www.decolonizingwealth.com>

13. <https://www.artsprofessional.co.uk/magazine/article/im-scared-brave-new-world-arts-because-it-might-look-just-old>

14. <https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/racial-ethnic-minorities.html>

15. <https://www.artsprofessional.co.uk/news/covid-19-disability-top-mind-dcms>

Methodology

In May 2020, Calgary Arts Development, in partnership with Calgary Economic Development, The City of Calgary, and the Rozsa Foundation, undertook a survey of arts organizations in Calgary to better understand and plan for the COVID-19 disruption to Calgary's arts, culture, and creative industries communities.

The survey was made available to qualified respondents via email. Respondents included organizations that had received support through Calgary Arts Development's Operating Grant Program, Original Peoples Investment Program, and the Project Grant Program for organizations. The City of Calgary also invited participation by organizations that receive Festivals and Events support.

There were a few non-arts organizations producing festivals and events that completed the survey that are not represented in this report. In analyzing those additional responses, their results mirrored the results of the organizations being reported on here, including reporting staff, programming, and artistic disruptions, as well as in their perceptions of the future.

The survey asked 62 questions related to organizational history and status, financial well-being, programming plans, and perceptions of the future. A complete list of survey questions is included in the appendix.

The survey was fielded using a secure online survey platform. There was no financial incentive to participate.

The survey data was cleaned in order to remove duplicate, incomplete or unusable responses. Responses were then analyzed using data analysis and visualization software. Text based responses were coded and analyzed.

A total of 157 useable responses were submitted. A total of 140 of these responses were from organizations that reported the primary mandate of their organization is related to arts and culture. This report is entirely focused on the organizations whose primary mandate is arts and culture related. The resulting survey confidence level is 95%.

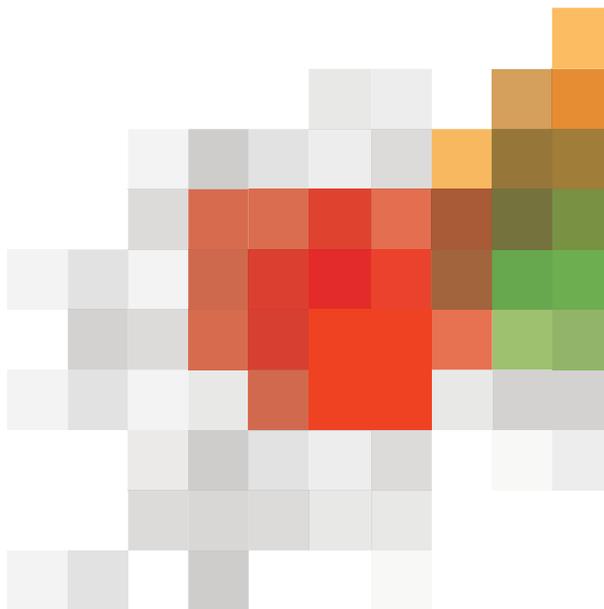
Respondents volunteered to participate in this online survey. Because the sample is based on those who self-selected for participation, no estimates of sampling error can be calculated.

Significance Testing

Significance tests were run on the survey results. In these tests, relationships identified as significant meant the probability of the relationships occurring purely due to chance is extremely low, usually less than 5%. Multiple comparisons were being run, so additional controls were put in place to ensure the p-value would be even lower. A series of z-tests were run to identify significant results. Tests were run with a confidence level of 95%. In order to ensure testing was conservative, strict data sufficiency rules were enforced and correction for Type 1 errors was done in all comparisons.

Text Responses

Throughout the survey respondents had the opportunity to answer open ended questions. At various points in this report those responses are quoted in italics.



DEFINITIONS

Throughout this report the following definitions are used:

Arts Organizations refers to survey respondents who self-identify that the primary mandate of their organization is arts and culture related.

Grants refers to funds provided to an individual or organization by a funding agency.

Literary Arts includes fiction, non-fiction, memoir, poetry, and other forms of experimental writing.

Visual Arts includes art and craft production whose output is visible, i.e., painting, weaving, glass, sculpture, photography, etc.

Occasionally, individual disciplines are included in two larger categories: performing arts and presenting arts.

Performing Arts refers to the survey discipline categories of circus arts, dance, music and sound arts, opera, orchestra, and theatre.

Presenting Arts refers to the survey discipline categories of digital arts, film and media arts, and visual arts.

COVID-19 Impact

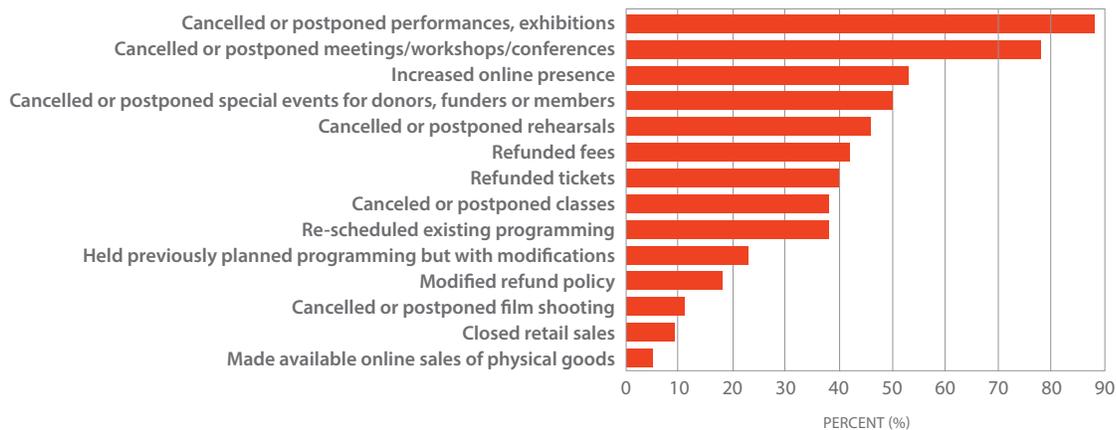
Attendance & Programming Impact

Cancelled Programming

The obvious and most immediate impact organizations are reporting is that they have cancelled or postponed performances and exhibits (88%) as well as workshops and conferences (78%). Less than a quarter (23%) of organizations have found a way to modify existing programming to continue under existing conditions. This will have an impact on the 55% of Calgarians that report they attend live events at least three times per year.¹⁶

The number of organizations reporting an increased online presence (53%) leaves a significant gap (35%) of organizations who have cancelled programming but have not managed to increase their online presence in any way, creating a significant lack of community connection and awareness.

PROGRAMMING ACTIONS TAKEN BY ORGANIZATIONS IN RESPONSE TO COVID-19



Has your organization taken any of the following programming actions as a result of COVID-19?

16. Living a Creative Life Success Indicator Baseline Report 2019 Update, <https://calgaryartsdevelopment.com/wp-content/uploads/2020/04/LACL-BaselineIndicatorReport-2019.pdf>

Most organizations report having to cancel events, with 85% of organizations having cancelled events from March 15 to April 30, 2020 and 92% of organizations having cancelled events from May 1 to August 31, 2020. A total of 6,339 events have been reported as cancelled; with most organizations having to cancel one to 10 events. Four percent of organizations report having to cancel over 50 events.



To compare to previous years, the Calgary Arts Development *Living a Creative Life Success Indicator Benchmark Report* reported that in 2018 153 organizations programmed 14,587 arts events and 10,370 arts education activities throughout Calgary.¹⁷

If you have cancelled public events, what is the total number of public events cancelled between March 15 and April 30, 2020? If you are unable to host public events in the summer, what is the total number of events you are likely to cancel between May 1 and August 31, 2020?

Of all the events that have been cancelled so far, most occurred in the first six weeks of the quarantine period with 3,588 events being cancelled between March 15 and April 30, 2020. This coincides with the end of traditional performing arts seasons. An additional 2,751 events have been cancelled between May 1 to August 31, 2020.

Event Insurance

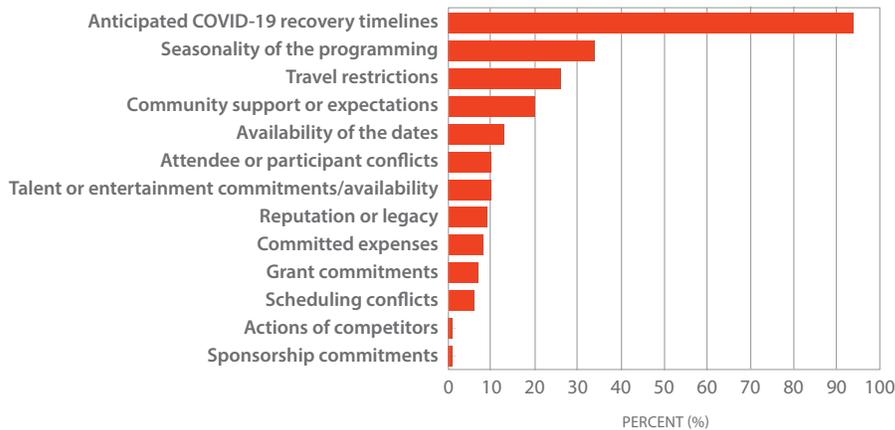
For organizations that did cancel events, only 5% of organizations report that they had cancellation insurance. The overwhelming majority (82%) report that they do not have cancellation insurance with some respondents (13%) unsure about that insurance coverage. Of the organizations that do have event cancellation insurance no organizations reported that they would receive compensation for cancelled events. 80% reported that they would see no financial compensation for events cancelled because of COVID-19 and 20% report being unsure of how their coverage will work in this situation.

Rescheduling Versus Cancelling

When asked why organizations have cancelled programming instead of rescheduling it, the anticipated COVID-19 recovery timeline was the primary reason for program cancellation (94%). As seen later in programming perception questions, organizations do not feel confident in being able to present programming until 2021.

17. *Living a Creative Life Success Indicator Baseline Report 2019 Update*, <https://calgaryartsdevelopment.com/wp-content/uploads/2020/04/LACL-BaselineIndicatorReport-2019.pdf>

MOTIVATIONS FOR CANCELLING



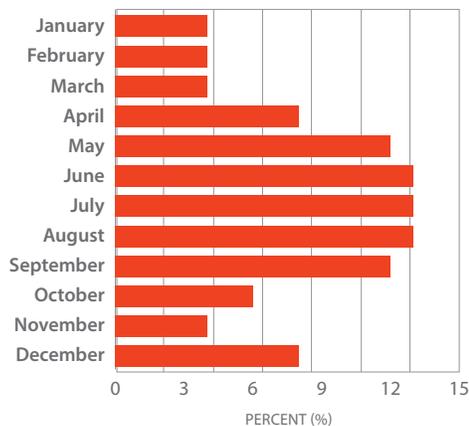
If you have cancelled programming and do not anticipate rescheduling, what were your primary decision-making motivations?

Factors regarding being unable to find suitable replacement dates informed decisions not to reschedule. The second most common reason programming was being cancelled was the seasonality of the programming. An example of this would be outdoor festival programming that would not be able to take place in the same way during the winter part of the year. Similar concerns about the inability to reschedule came up when organizations responded that availability of dates (13%), talent availability (10%), and scheduling conflicts (6%) lead the decision to cancel programming.

Seasonality of Programming

Some organizations have programming that takes place primarily in a particular season or month. This is particularly true of large festivals that occur in the summer and the many community organizations that program around the holiday season. 53 organizations responded that more than 50% of their audience attends programming in a single month. There is a strong crossover between organizations that were unable to reschedule their programming because of seasonality, and those organizations who are presenting most of their programming in a single month.

LARGE EVENTS BY MONTH



If more than 50% of your audience attends programming in a single month (typical of a large festival or event) each year, in which month does that programming take place?

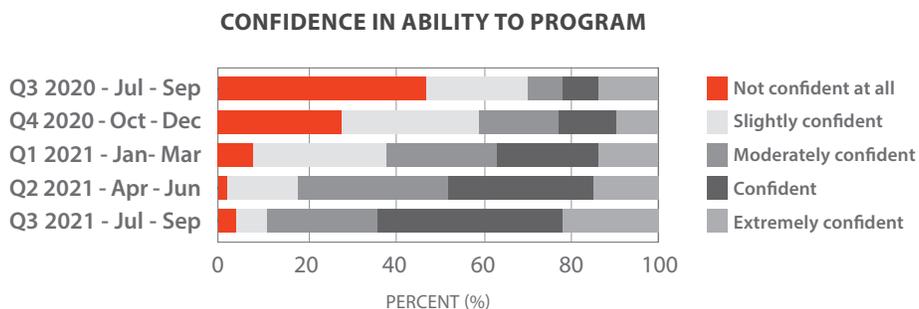
Over one-third (38%) of organizations report that the majority of their activity takes place in a single month. These are most often organizations producing festivals and events. There were a few non-arts organizations producing festivals and events that completed the survey that are not represented in this report. In analyzing those additional responses, their results mirrored the results of the organizations being reported on here, including reporting staff, programming, and artistic disruptions, as well as in their perceptions of the future.

There is a strong crossover between organizations that were unable to reschedule their programming because of seasonality, and those organizations who are presenting most of their programming in a single month. This includes large events traditionally held in a single month that are not directly arts related, who are also reporting they are not able to reschedule programming in the current year.

Of these organizations that have very focused annual programming, 52% reported that this programming took place in the summer season between June and September. Almost two thirds of large arts festival and event activity (63%) takes place between March and the end of August, which the government immediately imposed as a period in which large gatherings could not take place.

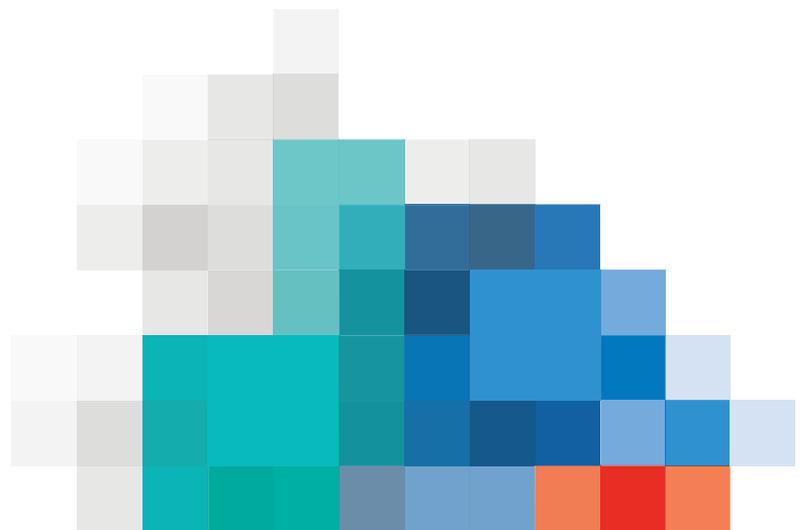
Confidence in Ability to Program

Confidence remains very low that programming will return anytime soon. When asked how confident organizations are that they will produce programming it's not until Q3 2021, July to September, that a majority of organizations (64%) report that they will be either confident or extremely confident that they will be able to produce programming.



How confident are you that you will produce programming in the future?

Through the rest of 2020 a majority of organizations report that they are either not confident at all, or only slightly confident, that they can produce any programming at all.



Online Programming

While 59% of organizations report they will be able to present some of their programming online in lieu of hosting public gatherings, most of the cancelled programming will not shift to online platforms. Some of the survey comments mention putting more emphasis on online content, and 11 out of 43 comments mention online content at least once.

“We have made great strides in our online offerings, but our core mandate cannot be met in this manner.”

“If large gatherings continue to be unsafe in 2021, we anticipate having to cease operations.”

One respondent shared that provincial funding cuts impacted their ability to move onto online platforms. *“We lost [Serving Communities Internship Program], non-profit funding and grants, [Community Initiatives Program]... and the ability to digitize our software...”* Pessimism seen later in the survey around further expected provincial cuts does little to ease these financial concerns.

The movement to online programming is more easily done by presenting arts in comparison to performing arts. Of the comments analyzed, choirs, dance organizations, or school activities highlight, by their interactive nature, how hard it is to move to online programming. Some have created online spaces, but they realize that online programming is not a fix all to the issues around health and safety and rehearsing or presenting. Finally, in lieu of ticket sales and other lost forms of revenue, such as casino revenues, some organizations have monetized their online content.

With 81% of Calgarians reporting that they consume arts programming by observing or listening, as opposed to live attendance, there is a healthy appetite for online consumption by audiences if organizations are able to create quality content.¹⁸

18. Living a Creative Life Success Indicator Baseline Report 2019 Update, <https://calgaryartsdevelopment.com/wp-content/uploads/2020/04/LACL-BaselineIndicatorReport-2019.pdf>

Program Cancellation Impact on Artists

Tied to the inability to produce programming is the result that organizations will be hiring fewer artists. Organizations reported that they were originally planning on hiring 4,274 artists between March 15 and August 31, 2020, but that number has been reduced to 795, an 81% reduction in artists being hired.

81%
*fewer artists
hired.*

If programming continues to be cancelled or postponed through the rest of the year, the cuts to artists hired will presumably continue to be this drastic.

Artists were already in a precarious situation before the loss of these opportunities. In the most recent Calgary Arts Professionals Survey¹⁹ most survey respondents reported earning low individual and household incomes. Over half of the individuals who reported their gross individual income earn less than \$35,000 per year (53%), much lower than the average income in Calgary of \$67,741. Two-thirds (66%) of arts professionals reported living in homes with a total household income under \$90,000, which is below the Calgary median of \$99,388. Most arts professionals (59%) were exceeding the Canadian Mortgage and Housing Corporation's recommended maximum spending of 30% of household income on housing costs.

The precarious situation artists are in has been further shaken by the recent disruption to multiple grant programs by the Alberta Foundation for the Arts. In terms of government funding, the Alberta Foundation for the Arts provides more grant dollars than either of the other two levels of government, which many feel is now in danger.²⁰

Gender and ethnicity further impact financial precariousness of artists. Gender and ethnicity relate to earning a lower wage; females and those who identify as a visible minority are more likely to report earning less than \$35,000 per year. Only 36% of self-identified females report living in homes with household income over \$80,000 compared to 48% of self-identified males. Those identifying as a visible minority are more likely to live in a household with income under \$50,000 (46%) compared to those who do not identify as a visible minority (37%). Females (52%) are more likely than males (40%) to report they have neither the time nor the money to advance their artistic skills and a lack of opportunity to show their work.

Recent statistics from the Center for Disease Control indicate that racial and ethnic minorities face a disproportionate number of illness and deaths from COVID-19.²¹ For those artists whose ethnic identity is related to earning a lower income as an artist, the health crisis also disproportionately affecting their community is that much more problematic.

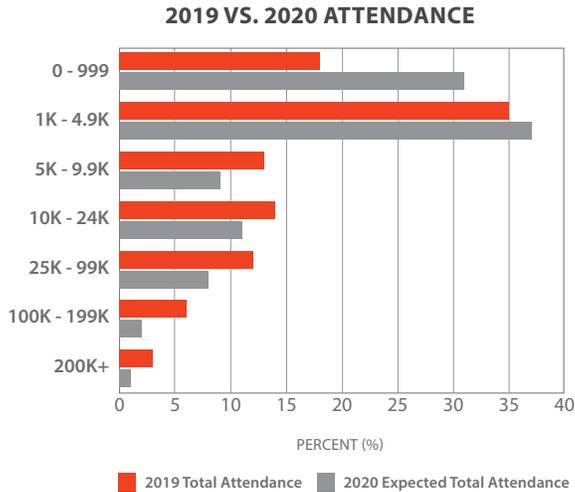
19. Arts Professionals Survey, <https://calgaryartsdevelopment.com/wp-content/uploads/2019/01/ArtsProfessionalsSurvey-2017.pdf>

20. <https://edmontonjournal.com/entertainment/local-arts/theyve-blindsided-us-artists-outraged-by-alberta-government-decision-to-shelve-grants>

21. <https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/racial-ethnic-minorities.html>

2019 Versus 2020 Attendance

The reduction in programming has an obvious result of a corresponding drop in expected audience sizes. Comparing total attendance in 2019 to 2020, organizations are expecting an unprecedented 54% drop in attendance from 4,069,503 total attendees in 2019 to 1,856,891 total attendees in 2020.



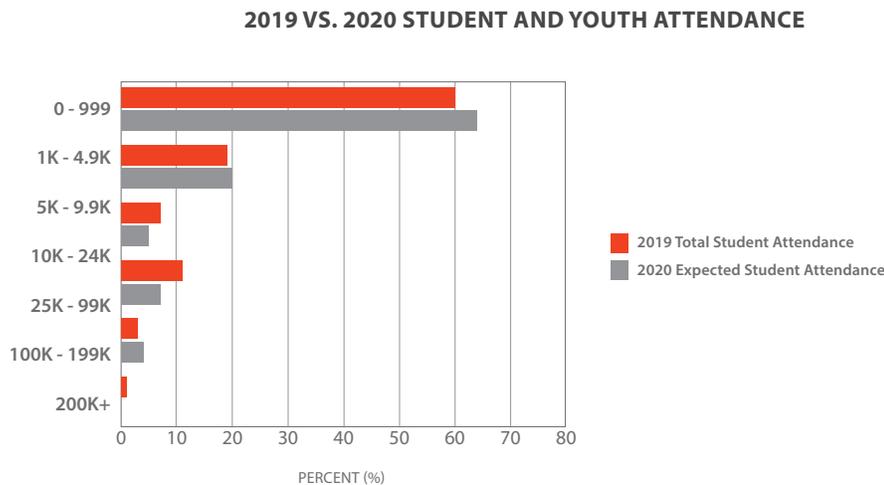
The number of organizations reporting that they expect a total annual attendance of under 1,000 has increased from 18% to 31%.

While some organizations have noted that they are able to retain some audience numbers through digital programming, most report that the programming that has been cancelled will not be re-scheduled in the current year.

Student & Youth Attendance

Student and youth attendance is also expected to see sharp decline from 546,730 in 2019 to 291,289 in 2020.

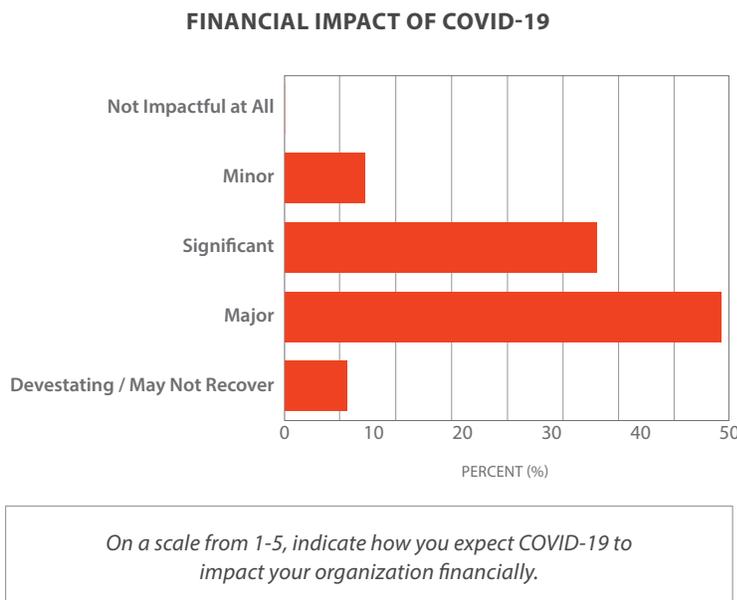
A lack of clarity around what form schools will take when reopening makes this a particularly difficult figure for organizations to estimate and budget around. While much school programming did occur in the first three months of the year, there is no clarity on what form programming could take in the fall. Further disrupting organizations' optimism around youth participation are provincial budget cuts to educational programming in Calgary, which may result in a reduction of arts programming in schools provided by external partners.²²



22. <https://calgaryherald.com/news/politics/cbe-looking-at-hundreds-of-job-cuts-because-of-ucp-budget>

Financial Impact

When asked to rank the impact of COVID-19 on their organizations financially 84% described the impact as significant or major. 7% of organizations described the impact as so significant that they may not recover. No organizations, not even those for whom programming already is entirely digital, reported that COVID-19 would have no impact at all.

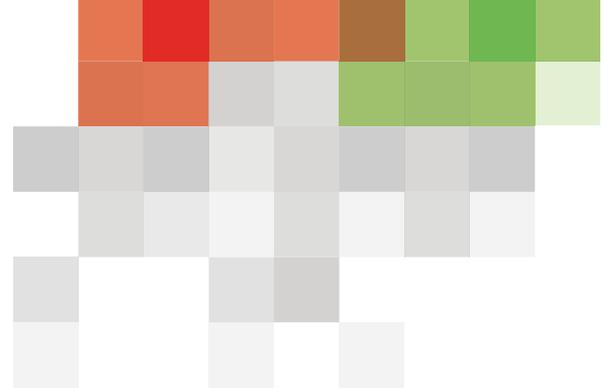


40% of organizations report they have already begun to use their financial reserves.

97% of organizations report that their total anticipated revenue for 2020 has been impacted by COVID-19. 83% of organizations do report that there are expenses that they budgeted for in 2020 that they will no longer have to expend, but the size of reported expenses being saved is dwarfed by the size of revenues no longer being generated.

There was a dramatic shift in 2018 reporting from organizations receiving operating funding from Calgary Arts Development, which was the closing of the gap between revenue and expenses. In the most recently reported fiscal year (2018) revenues exceeded expenses by less than 1%.²³ In the previous two years emergency funding provided by The City of Calgary inflated revenues to provide a more substantial differential between revenues and expenses. While substantially increased funding in 2019 from The City of Calgary was able to help widen this gap for some organizations in the last year, the loss of revenue will place many organizations into a deficit position in the current year.

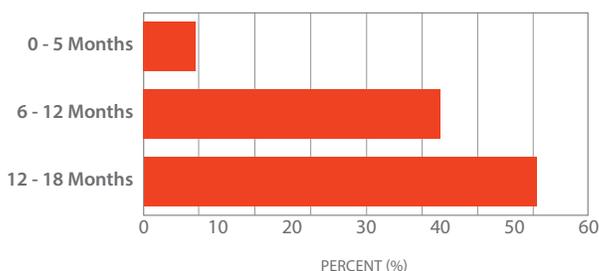
23. *Living a Creative Life Success Indicator Baseline Report 2019 Update*, <https://calgaryartsdevelopment.com/wp-content/uploads/2020/04/LACL-BaselineIndicatorReport-2019.pdf>



Organizational Fragility

Almost half of all organizations (47%) responded that they will be have to cease operations in the next 12 months if current conditions continue. As most organizations don't anticipate being able to resume programming until 2021, these organizations would possibly cease operations unless they were able to begin programming earlier than they anticipated or earn revenue through some other means earlier than 2021.

HOW LONG CAN ORGANIZATIONS OPERATE UNDER CURRENT RESTRICTIONS



How many months do you estimate your organization can continue to operate under the current restrictions before ceasing operations?

Fewer respondents to this survey (7%) reported having less than three months of ability to operate in the current conditions than in a survey from Calgary Arts Development completed in March. The better result may be the results of a combination of emergency funding provided by Calgary Arts Development, federal wage subsidy programs, reduced expenditures by organization to lengthen organizational sustainability, and some smaller organizations not responding to this survey as a result of staff furloughs.

Due to the funding constraints placed on non-profit organizations, establishing a cash reserve is difficult because most funding received is project-based or restricted. Therefore, few organizations have some kind of savings, and are unsure how long they will last given the compounding uncertainty: safety guidelines, restrictions on gathering, and how long current COVID-19 conditions could last. These organizations are unsure that they will be able to operate past 2021/22 regardless of their savings due to revenue losses.

Types of Lost Revenue

Lack of savings compounds pressures on revenue generation for future financial sustainability (of the comments sampled there were 59 references to revenue, wages, donations, funding or finances with most comments referencing savings or revenues at least twice).

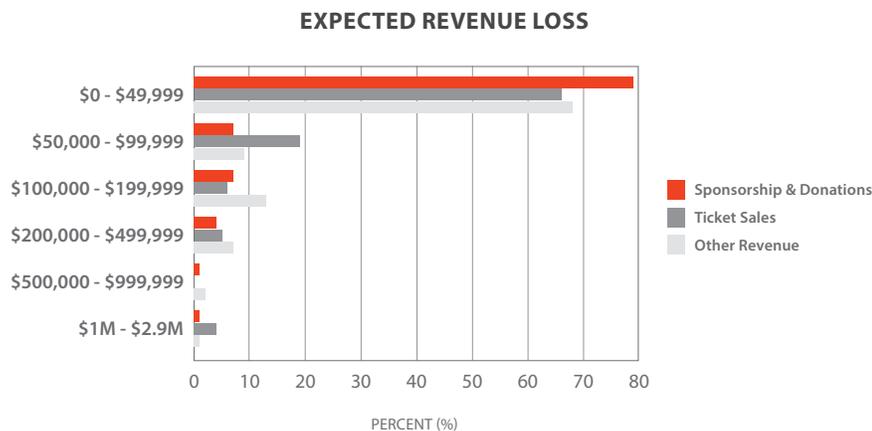
For most organizations surveyed immediate instability is the result of lost revenue from a variety of sources. Lost revenue is anticipated to be over \$20.6M for these 140 organizations, broken out into the following categories:

- ◆ \$4.6M in lost sponsorships and donations
- ◆ \$7.7M in lost ticket sales
- ◆ \$8.3M in loss of other revenue



Over a third of organizations expect to lose up to \$50,000 in all three categories; sponsorships and donations, ticket sales, and other revenue.

The estimated loss in revenue is close to the reported losses that DataArts has reported internationally, that the average arts organization will see a deficient equivalent of 26% in lost revenue.²⁴ It is also in line with a survey of Ontario non-profit arts organizations that anticipate lost revenue of around 16% through the end of June.²⁵



What is the approximate earned revenue total that you budgeted for in 2020 that you anticipate not being able to generate as a result of the COVID-19 impact in each of the following categories?

In addition to lost earned revenue, funds raised by organizations through casino and bingo operations have also been affected. Casino and bingo establishments were also closed in mid-March. From the organizations that responded to the survey, 32 reported that they had planned to hold a casino or bingo fundraiser between March 15 and August 31, 2020. Those 32 organizations had budgeted \$1.5M in revenues from those events. Organizations who received operating grants reported earning a median of 17% of their total annual budget from those events. Even if those events are rescheduled for a later date, the lost revenue will affect cash flow and organizations' ability to continue operating.

It is important to note that \$20.6M in lost revenue and additional \$1.5M in lost casino and bingo revenue is only the amount reported by the 140 survey respondents who were able to complete this survey. There are over 300 non-profit arts organizations in Calgary, so the losses are likely significantly higher. With many organizations no longer having any staff at all, they are not able to answer the survey to report on what their losses have been.

In Calgary, the COVID-19 impact on revenue is compounded by the crash in energy prices. Oil prices will undoubtedly affect expectations around the ability to generate revenue from sponsorship and donations as well as audience attendance and value expectation after COVID-19 passes.

24. <https://culturaldata.org/pages/long-haul/>

25. https://www.arts.on.ca/oac/media/oac/Publications/Research%20Reports%20EN-FR/Artists%20and%20Arts%20Organizations/OAC_COVID-19_Survey_Report_April2020_FINAL-Accessible.pdf

Reduced Expenses

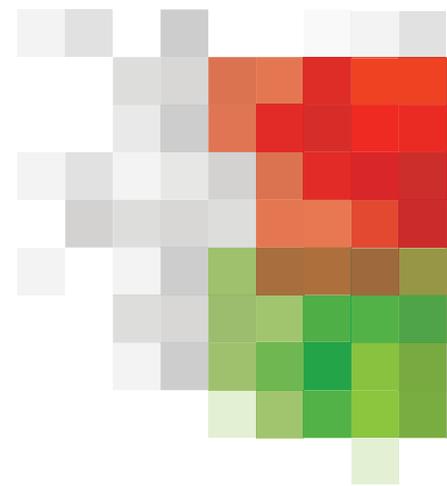
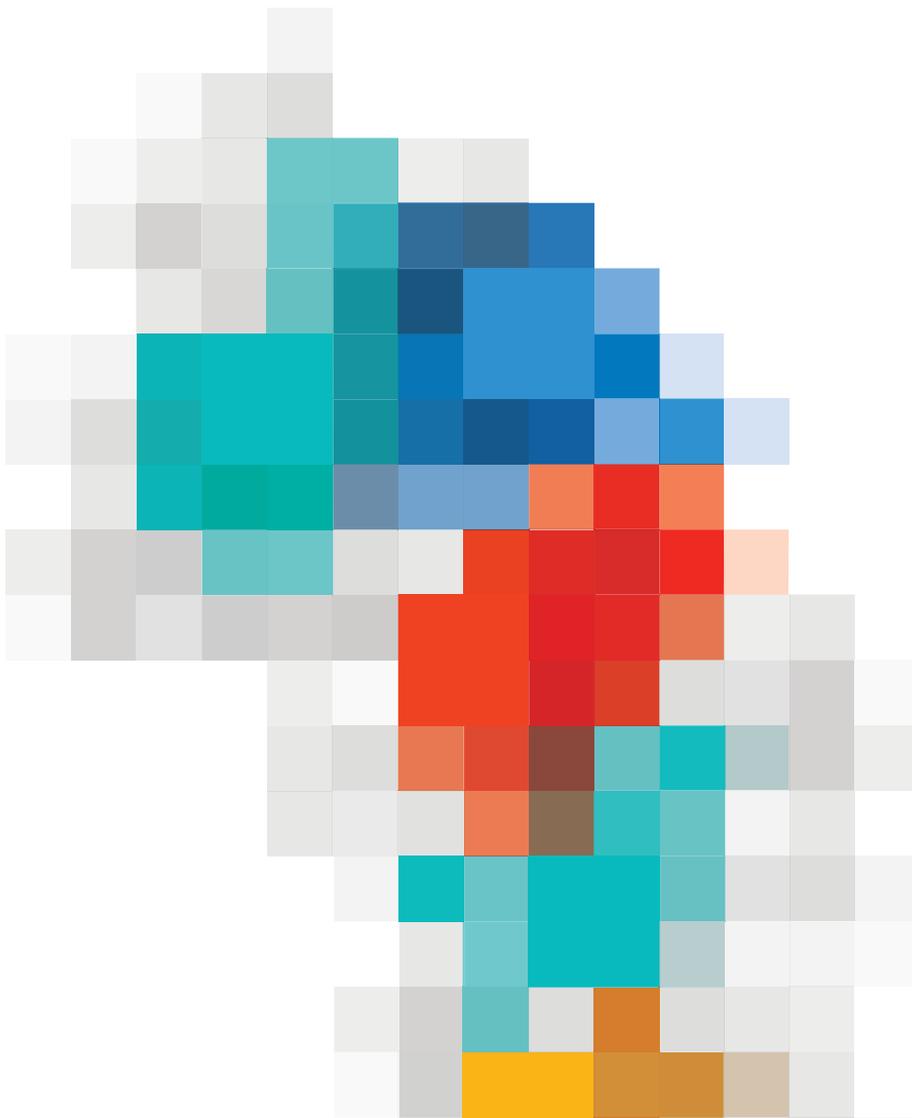
Organizations report that they will have a variety of expenses that they will no longer have to expend, from reduced staff and artist costs to lower costs related to programming. Organizations reported that they will be able to save \$6.9M in their current fiscal year.

There is a difference of \$13.7M for lost revenue that is not tied to a corresponding drop in expenses. Based on 2019 total revenues for organizations reporting, that would leave a 15% budget gap.

“Our on-going expenses, for example, the significant lease for the theatre facilities continues; expenses are not cancelled.”

Rippling Effect on Charitable Giving

Financial impact is not limited to the organizations programming these events. 24% of survey respondents reported that some of the events they produce are in support of other charities. These organizations were able to raise \$325,404 in 2019 but now only anticipate being able to raise \$41,300 in 2020, an 87% reduction. Many of these organizations were raising funds for the Calgary Food Bank, an organization that itself will be in high demand with increased public unemployment.



Organizational Impact

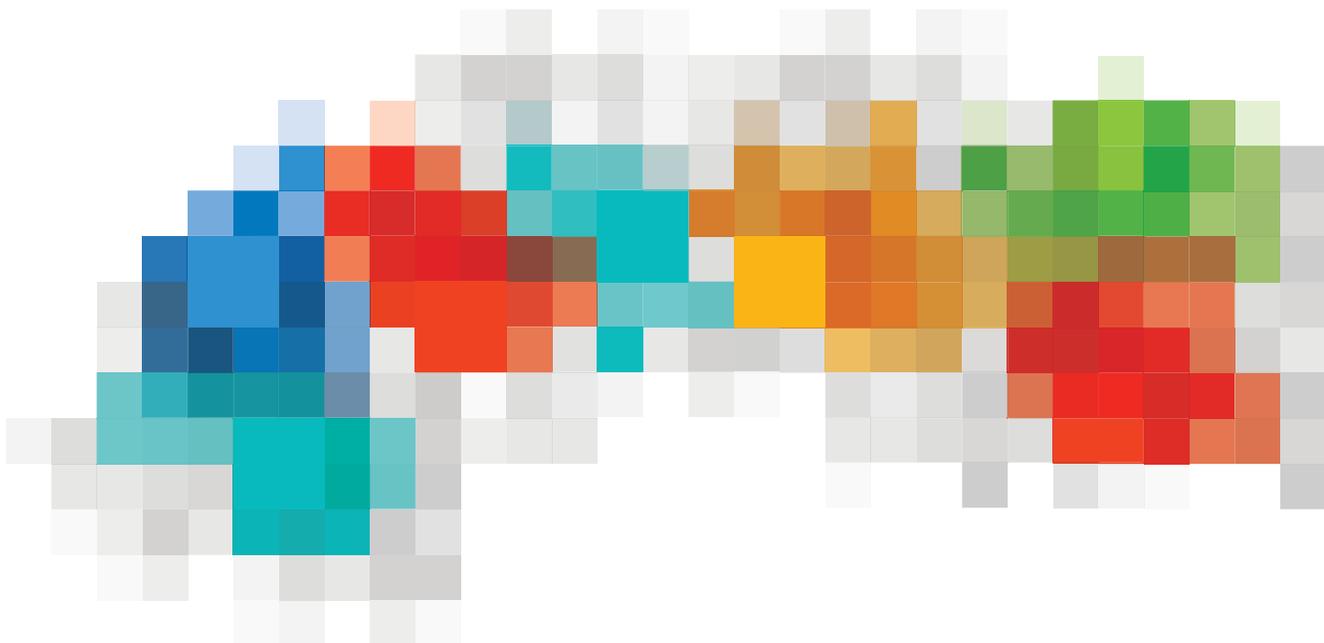
Words like *struggling*, *worry*, *fear*, and *disconcerting* characterize the emotions organizations are feeling right now. Of the comments looked at there are 42 references to negative emotions in the 43 comments analyzed. Only three comments mention potentially positive emotions.

ORGANIZATIONAL IMPACTS OF COVID-19



Has your organization seen any of the following impacts directly as a result of COVID-19?

When describing the direct results of COVID-19 on their organization's ability to operate, almost two-thirds (64%) describe the impact as extreme and they have either ceased or nearly ceased operations entirely. Almost one-third (29%) have indicated that the indirect impact, the impact on their partners, has been so disruptive it has resulted in a change in how their own organization is able to operate.

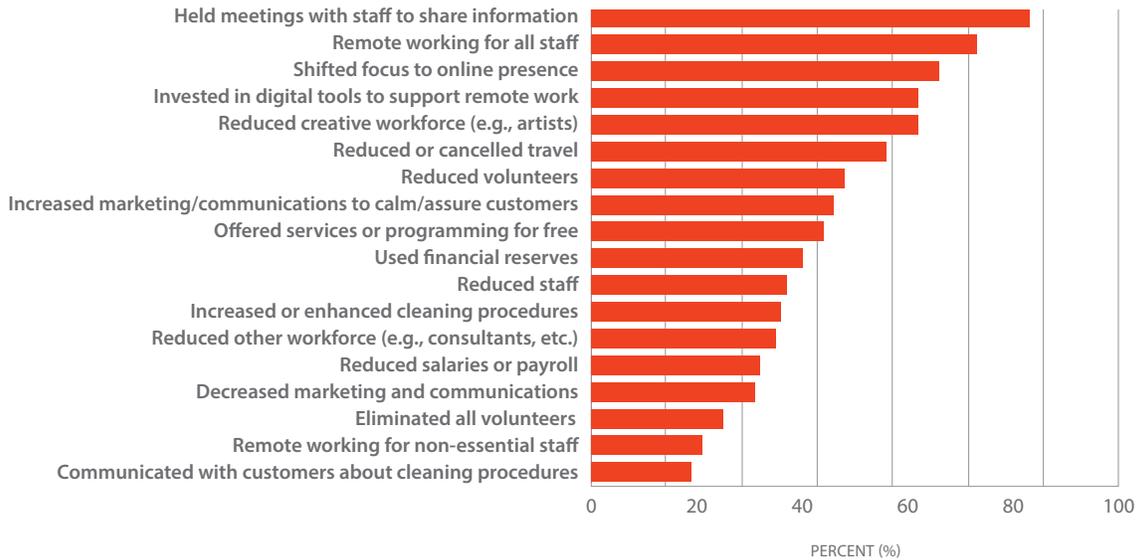


Staff Cuts

Organizations have taken a variety of steps to address the impact of COVID-19 on their staff. Almost three-quarters (73%) of organizations have switched to remote working for all staff. For most organizations this switch has come at a financial cost, with 62% reporting the need to invest in digital tools to support that shift.

Most organizations have reduced employment in some way, with organizations reducing artists (62%), staff (37%), reduced salaries (32%), and reducing or eliminating volunteers.

ACTIONS TAKEN IN RESPONSE TO COVID-19



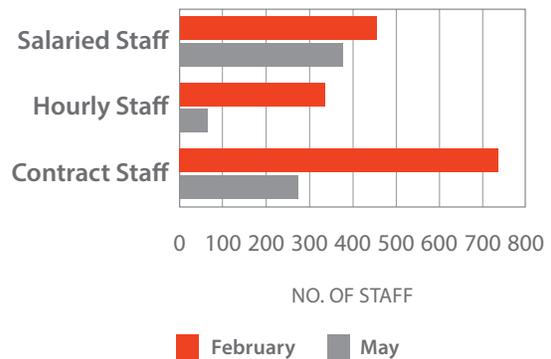
Has your organization taken any of the following actions directly as a result of COVID-19?

While only one-third (32%) of organizations reported making staff cuts, the cuts that have been made were dramatic. Total staffing levels in reporting organizations was 1,525 positions in February and dropped 53% to 715 positions in May.

Most positions reduced were in contract staff which were reduced by 63% and hourly staff which were reduced by 81%. While salaried staff were reduced 17%, 32% of organizations reported that they also reduced salaries for those positions.

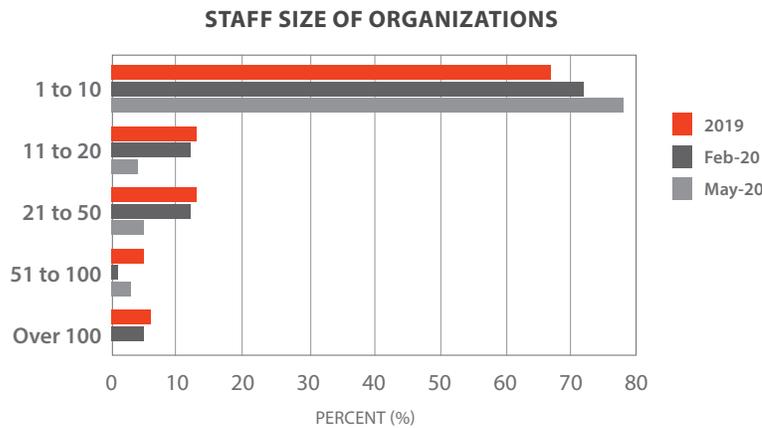
Non-salaried staff have also been cut. One organization wrote that: *"We are likely to have to cancel the majority of next season and as our staff are contractors and not staff, we have not found any relief for their salaries."*

FEBRUARY 2020 VS. MAY 2020 STAFF LEVELS



Please indicate the number of staff, contractors, and volunteers with your organization in 2019 and 2020.

With 88% of organizations reporting that they have already cancelled over 6,000 events through the summer, it is unsurprising that hourly and contract staff would not be needed to support that programming. With most organizations not hopeful that programming will resume until sometime in 2021, it may be unlikely that most of these positions will return in the current year.



Please indicate the number of staff, contractors, and volunteers with your organization in 2019 and 2020.

There are now 20% fewer organizations reporting that they still have any staff at all. For those that do still have staff, there has been a shift in the organizational ecology in terms of organizational staff size. While in February there were five organizations that had a staff size over 100 employees, there are no longer any organizations in that category.

The number of organizations reporting that they have a staff size of over 10 has been reduced from 30 in February down to 12, with those 18 organizations that were previously in that category now reporting staff sizes of 10 or less. 14 organizations that previously had staff now report that they have any staff at all.

In addition to these staff positions, many organizations report hiring seasonal staff to support large festivals and events. In 2019, organizations surveyed reported hiring 419 seasonal staff. Those same organizations reported expecting to hire 70% fewer seasonal staff (126 positions) in 2020. While some summer student positions may still be needed, the support needed to produce large events is largely unnecessary in 2020.

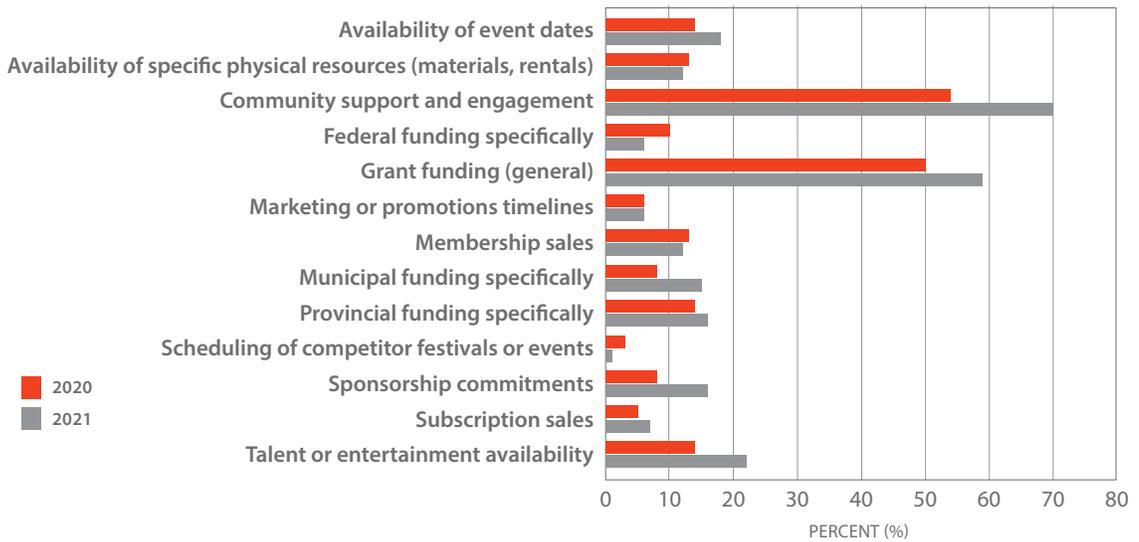
Arts Versus Other Non-Profits

Imagine Canada's recent report on how charitable organizations are faring during the COVID-19 disruption reveals that arts organizations in particular are facing increased negative consequences.²⁶ Arts organizations are more likely to report decreased demand and ability to program, as well as more difficulty transitioning their programs online than other non-profits. As a result, arts organizations are more likely to report decreased revenues and greater layoffs.

What's Needed to Survive 2020 and 2021

Arts organizations identified the most critical factors for programming success in both the remainder of 2020 and then 2021. In both cases, the only factors that received more than 50% of comments was the need for community support and engagement, followed by grant funding.

CRITICAL FACTORS IN PROGRAMMING SUCCESS



*What are the three most critical factors to the success of your programming for the rest of 2020? and
What will be the three most critical factors to the success of your programming for 2021?*

Most organizations report an expected significant decline in both sponsorship and donations on top of obvious lost earned revenue. While many organizations are pessimistic about public funding for the arts, general operating dollars are still identified as a critical need to ensure flexibility when planning for programming in the future.

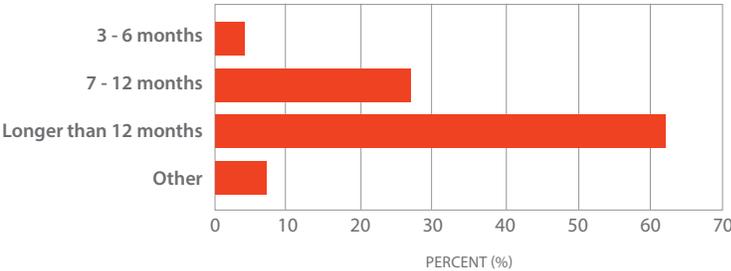
Availability of equipment and availability of talent ranked high in necessity to be able to program again. With uncertainty surrounding reopening protocols and dates, there will be a scramble to access talent and resources if organizations try to reopen at the same time without a long advance planning period.

26. https://imaginecanada.ca/sites/default/files/COVID-19%20Sector%20Monitor%20Report%20ENGLISH_0.pdf

Looking Forward

Whether or not organizations anticipate being able to program earlier than this, organizations expect to be dealing with effects of COVID-19 for over a year. Almost two-thirds of organizations (62%) expect that their organization will be dealing with the impacts of COVID-19 for longer than 12 months.

ANTICIPATED LENGTH OF COVID-19 IMPACT ON ORGANIZATION



How long do you anticipate your organization will have to deal with the impacts of COVID-19?

Most organizations who selected "other" (7%) in the chart on the left anticipate dealing with the effects of COVID-19 either for multiple years, or until schools are able to return to normal for those organizations who have a mandate focused on arts education.

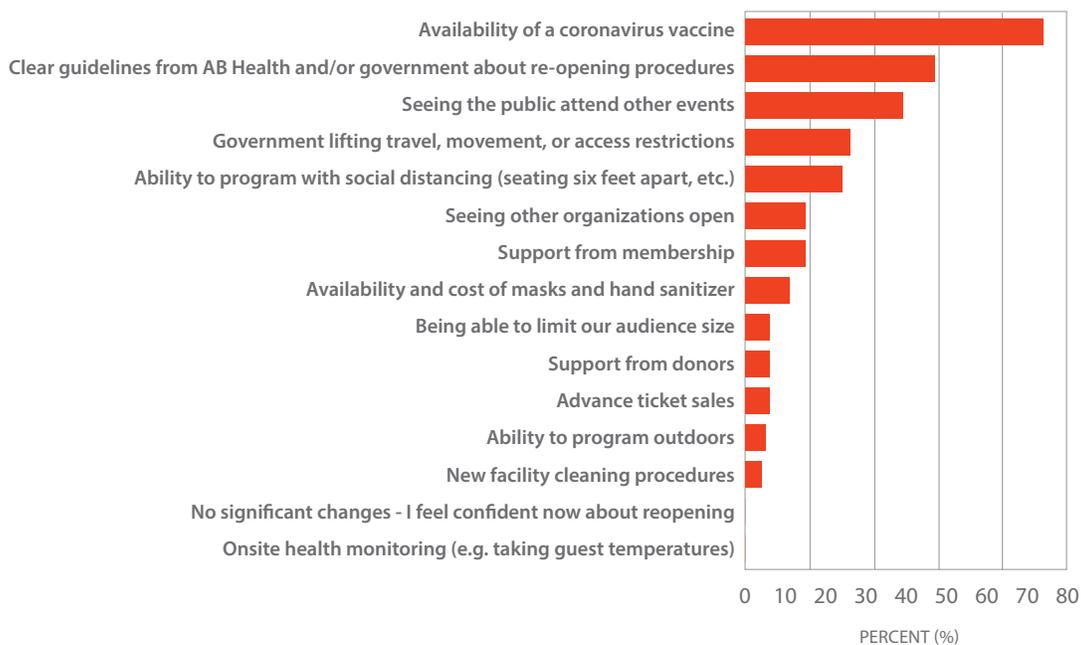
Arts organizations are anticipating having to deal with the impact of COVID-19 longer than non-profits in general. A survey on the impact of COVID-19 on Alberta's non-profit organizations showed 70% of organizations anticipating having to deal with the impact for less than six months.²⁷ Only 4% of arts organizations in our survey shared the belief they would no longer be dealing with COVID-19 six months from when they completed the survey.

These responses are in keeping with expert opinions of comfort timelines. In a recent survey on 511 epidemiologists the majority (64%) would not feel comfortable attending sporting events, plays, or concerts for at least a year. In fact, attending a sporting event, concert or play ranked very last in the timeline of when they would return to an activity.

27. The Impact of COVID-19 on Alberta's Nonprofit and Voluntary Organizations, Alberta Non-profit Network, 2020

What will make organizations confident in being able to eventually re-open to the public? While most respondents (74%) report that the availability of a vaccine is most important to them, the timing for that option will be beyond their control.

WHAT WILL MAKE ORGANIZATIONS CONFIDENT IN OPENING TO THE PUBLIC?



Please indicate the three options that will make you most confident in opening to the public?

One organization wrote that: "...We are incredibly dependent upon a vaccine to see our organization return to any kind of normal production, revenue, expense framework," which is a sentiment shared by other organizations throughout their comments as well.

Just under half of respondents reported that clear guidelines from Alberta Health around re-opening procedures would make them more confident when reopening. While the recent reopening of theatre spaces in Phase 2 did include guidelines, clarity for art galleries was less clear in Phase 1 creating uncertainty in the sector.

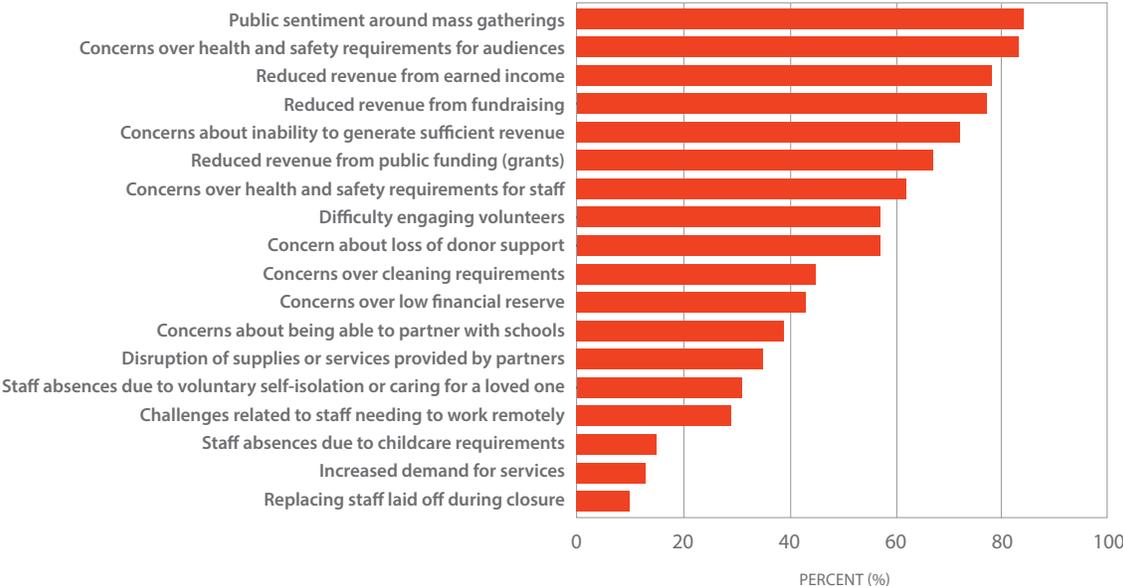
Many organizations are concerned about "the fine details" of how and when to open. Respondents simply need more information about opening safely—" [R]ight now, our biggest challenge is receiving the information we need." These are diverse sets of organizations needing safety guidelines for their specialized needs, especially around physical distancing—"We normally have 50 to 80 performers singing and dancing together indoors for three or four hours every single day. Will we be able to do this at all?... What changes do we need to make to our facility to allow for physical distancing?"

Beyond those external factors, seeing the public attend other events was the only other confidence factor over 30% of organizations prioritized. This reflects the need to be assured that audiences will be willing to return before organizations are able to open their doors. Many large theatre organizations are reporting that production costs are so high they cannot even begin that process, which takes months, before knowing that there will be an audience ready. This further extends the timeline for when artistic programming will return.

“The cost benefit analysis of partial reopening with adding safety measures does not appear to be a feasible model.”

Though some arts organizations have been allowed to reopen under Phase 1 and Phase 2, we have not seen a majority of organizations reopen as many feel the public does not yet have the appetite for returning. There are local, national, and international surveys being administered to better understand public sentiment related to attendance which will be critical to guiding organizational decision-making.²⁸

CHALLENGES ARTS ORGANIZATIONS ARE CONCERNED ABOUT WHEN REOPENING



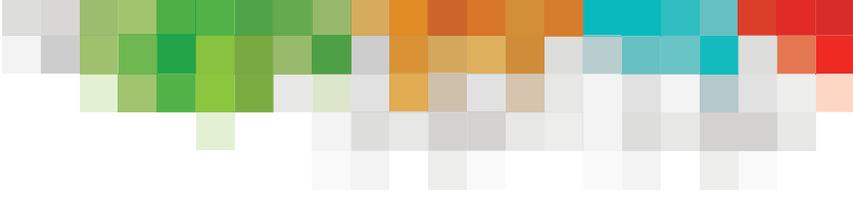
What challenges do you anticipate when reopening?

There is a direct relationship between some of the most important factors related to confidence in reopening and what organizations are most concerned about with regards to reopening.

Seeing audiences at public events will create confidence in reopening, because the primary challenge organizations articulate around reopening is public sentiment around mass gatherings (84%).

Organizations are uneasy about audience comfort-level in returning to programming given the restrictions on gathering. Organizations are asking: *“How much will we have to reduce our audience capacity to provide distancing and other safety... And when we reopen with significantly reduced capacity, will the public even be comfortable attending?”* There is a desire for a vaccine in order to feel safe enough to open. *“Our concern is next season. We are getting feedback that without a vaccine, our patrons will not be comfortable returning to concerts.”*

28. <https://www.artspromotional.co.uk/magazine/article/getting-operationally-ready>



Three of the top five challenges organizations anticipate are the ability to generate enough revenue to operate, with concerns around the ability to generate earned income, lack of fundraising support, and insufficient operating revenue all top concerns for over 70% of respondents.

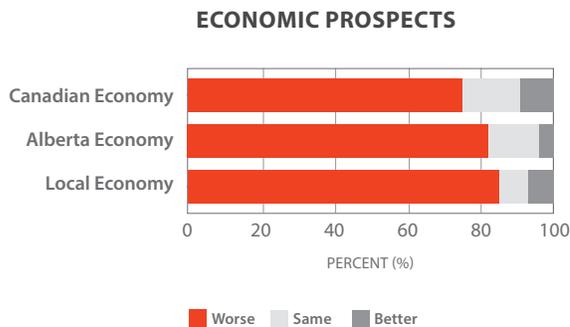
Physical distancing is a huge hurdle as many venues have to operate at half capacity. The concern with this is, is opening at half-capacity going to be enough to generate income for future financial stability? *"We are interested to see some guidelines for multi-purpose facilities (like community centres, rec centres) come out, and we have no idea what the next school year will hold. Which has a huge impact on our financial situation."* In this same comment there is further worry that the push for opening will mean that there will be less emphasis on continued financial support.

Not only this, but organizations are concerned for the safety of workers, performers and artists, volunteers, and audiences. *"I am very concerned about presenting a show with a physically distanced audience, the impact that will have on audiences, volunteers..."* The technical aspects of responding to a health crisis, the health and safety of audiences (84%) and staff (62%) is also frequently cited as a challenge when reopening.

It's worth noting that organizations are reporting a wide variety of challenges they will face when reopening. Guidelines for reopening, or the lack of guidelines, will look different for each organization when put into practice. Organizations working in different disciplines, sizes, scales, and serving different audiences will each face their own challenges and need a one-size-fits-one solution when recovering.

Perceptions of the Future

Survey respondents were asked a series of perception questions around how they anticipated things faring over the next year in the areas of the economy, the arts sector performance generally, and financial support for arts and culture. Perceptions of the next year were quite bleak in all almost every area.

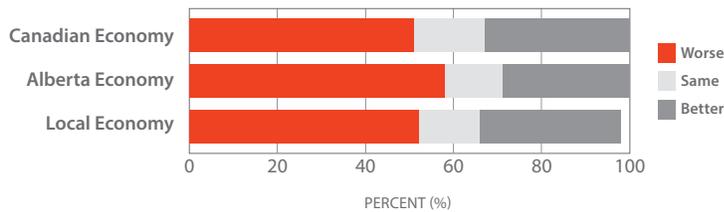


Thinking ahead over the next year, the overall local/Alberta/Canadian economy will be...

When asked about perceptions of how the economy would be faring over the next year, respondents got more pessimistic the closer to home the geography got. While 75% of respondents think the Canadian economy will get worse over the next year, that number rises to 85% when asked about the prospects of the local economy.



ECONOMIC OUTLOOK OF CALGARY BUSINESS LEADERS



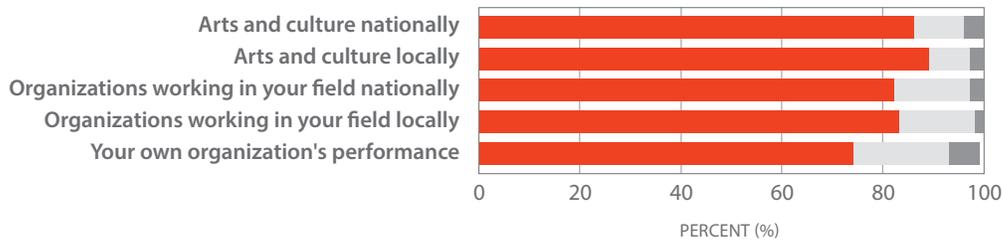
Now thinking ahead over the next year, how do you think things will be for the following?

This is a much more pessimistic view than Calgary business leaders in general reported in a recent survey by Calgary Economic Development, where 52% think the overall local economy will get worse, and 50% think the Canadian economy will get worse over the next year.²⁹

Respondents largely anticipated the performance of arts and culture organizations would mirror that of the local and national economy. They anticipated that other organizations working in their field or discipline locally would be in a worse position than they are now (85%) and generally arts and culture locally would be in a worse positional (89%).

The outlook is only slightly less pessimistic for their expectations nationally, where they perceive organizations working in their field or discipline nationally will be in worse positions than now (82%) and arts and culture generally will be worse off (86%).

ARTS AND CULTURE OUTLOOK



Thinking ahead over the next year, X will be...

Though they anticipate their own organization's performance will also be in a worse position over the next year (75%), their optimism about their own performance is slightly less bleak than their expectations of the field locally or nationally.

There is anxiety regarding government funding. Some have commented on a need for emergency relief. Others are asking for longer range thoughtfulness. *"We worry that the [f]ederal relief funding is focusing only on organizations struggling in the short term... there won't be any support in place for those who will suffer more from the mid-term."* Depending on the organization, some did not qualify for current government support programs.

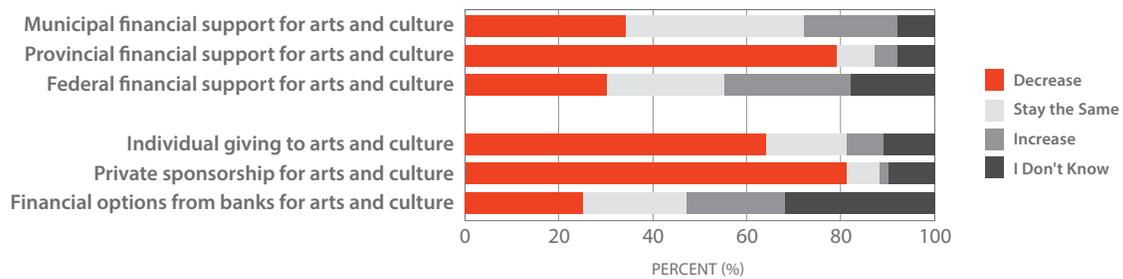
"Government support will be crucial to the survival of the arts in Canada over a much longer period of time."

29. "Calgary Business Leaders Market Perceptions" Calgary Economic Development, April 2020

There is continued worry about future funding cuts by the provincial government. "Based on the budget cuts, most of us fear, both streams of funding [provincial and casino revenue] will disappear in the next year, leaving a giant operational budgeting hole for all of us." Some organizations have already seen steep cuts to their operating budgets.

When asked about forms of financial support from the government over the next year, most respondents expected that both federal and municipal support for arts and culture would either increase or stay the same.

FINANCIAL SUPPORT FOR ARTS AND CULTURE



Thinking ahead over the next year X for arts and culture will...

In terms of provincial support, 79% of respondents reported that they expect financial support to decrease. This survey was completed during the same period as the cancellation of summer provincial project grants, which has created an atmosphere of concern around provincial arts support.

79% of survey respondents reported that they receive grant funding from the Province of Alberta through the Alberta Foundation for the Arts with another 41% reporting that they receive funding from the Province of Alberta through some other means.

In the last year, arts organizations who received operating grant support from Calgary Arts Development reported receiving over double the funding from the province than they do from municipal government. A decrease in support at the provincial level would impact a larger portion of the budget, adding to an already problematic environment where reported earned income is dropping at over twice the rate that expenses are.

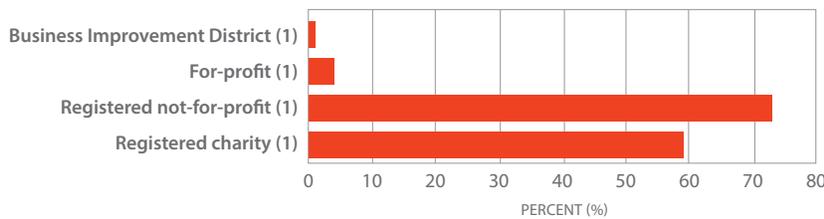
In terms of private support for the arts, most anticipate that both sponsorship (80%) and individual giving (64%) will decrease over the next year.

Survey Respondents Organizational Identity

Arts & Culture Mandate

When asked whether the primary mandate of their organization related to arts and culture, 140 out of 157 (89%) organizations reported that it was. The remaining organizations are primarily organizations related to sport and general leisure. Their responses are not included in this report. A separate report on those 17 organizations will not be completed, as the sample size is too small to be able to develop meaningful conclusions.

ORGANIZATIONAL TAX STATUS



Is your organization (select all that apply)...

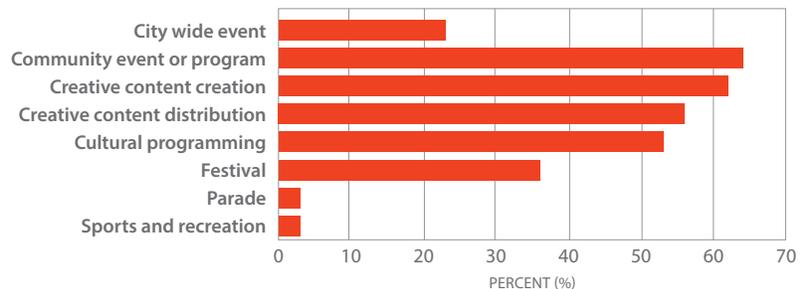
Of these 140 organizations, 85% have been operating for over 10 years, with 9% reporting operating for six to 10 years and 6% reporting operations of under five years.

Only 5% of organizations report that they do not fall under either a registered non-profit or charity model of tax status.

Organizational Activities

Almost two-thirds (64%) of organizations report their activities include community events or programs. Over a third (36%) of organizations produce a festival as part of their activities, and almost a quarter (23%) produce a city-wide event as part of their programming.

ACTIVITIES OF ORGANIZATIONS



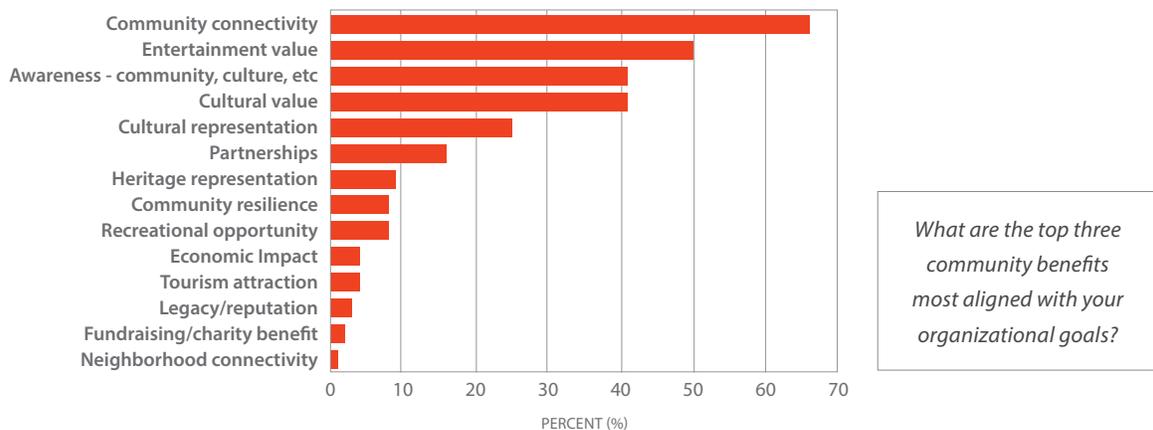
Do any of the following describe your activities as an organization?

Community Benefit

When describing community benefits that align to organizational goals, most organizations (66%) identify community connectivity being a primary benefit. Entertainment value comes next (50%) followed by cultural value and community or cultural awareness (both 41%).

Other studies identify the clear relationship between community connectivity and belonging to community economic vitality.³⁰ While it is encouraging to see so many organizations focused on activities that result in positive economic impact for Calgary, the decrease in arts activities seen earlier in the programming impact may result in weaker ties between citizens and the community or city they reside in.

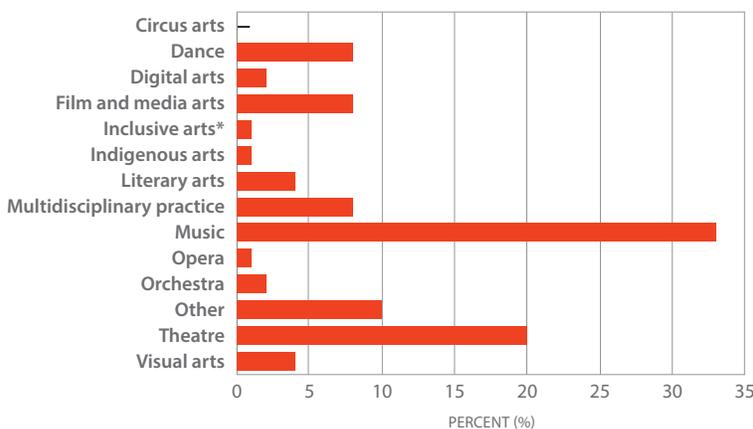
COMMUNITY BENEFITS OF ARTS ORGANIZATIONS



Primary Artistic Discipline

Finally, arts organizations identified the primary discipline they are working in. A plurality (33%) of organizations identify music as their primary discipline followed by theatre (20%). No other discipline had 10% or more organizations reporting that that as their primary area of work.

PRIMARY ARTISTIC DISCIPLINE



*Made for or with those who self-identify as Deaf, Disabled and/or Mad or person with an impairment

When aggregated into the areas of performing arts and presenting arts, performing arts (opera, orchestra, dance, theatre, music) accounted for 64% of organizations and presenting arts (film and media arts, visual arts) represented 14% of organizations.

What is your organization's primary discipline?

30. "Calgary Business Leaders Market Perceptions" Calgary Economic Development, April 2020



DATA AVAILABILITY

Calgary Arts Development is committed to providing open data. Aggregated data from this survey is available upon request at impact@calgaryartsdevelopment.com.



calgaryartsdevelopment.com

