



# COVID CULTURAL IMPACT STUDY

*Presentation for:  
Central Puget Sound Economic  
Development District Board  
May 4, 2022*

Photo Credit: Youth in Focus, Creative Career Cohort class 2021, photo courtesy of Youth in Focus





# RESEARCH STUDIES



An Economic Impact Study of Arts,  
Cultural, and Scientific Organizations  
in the Central Puget Sound Region

2014



2014 Economic Impact Study  
[Artsfund.org/EIS](https://artsfund.org/EIS)



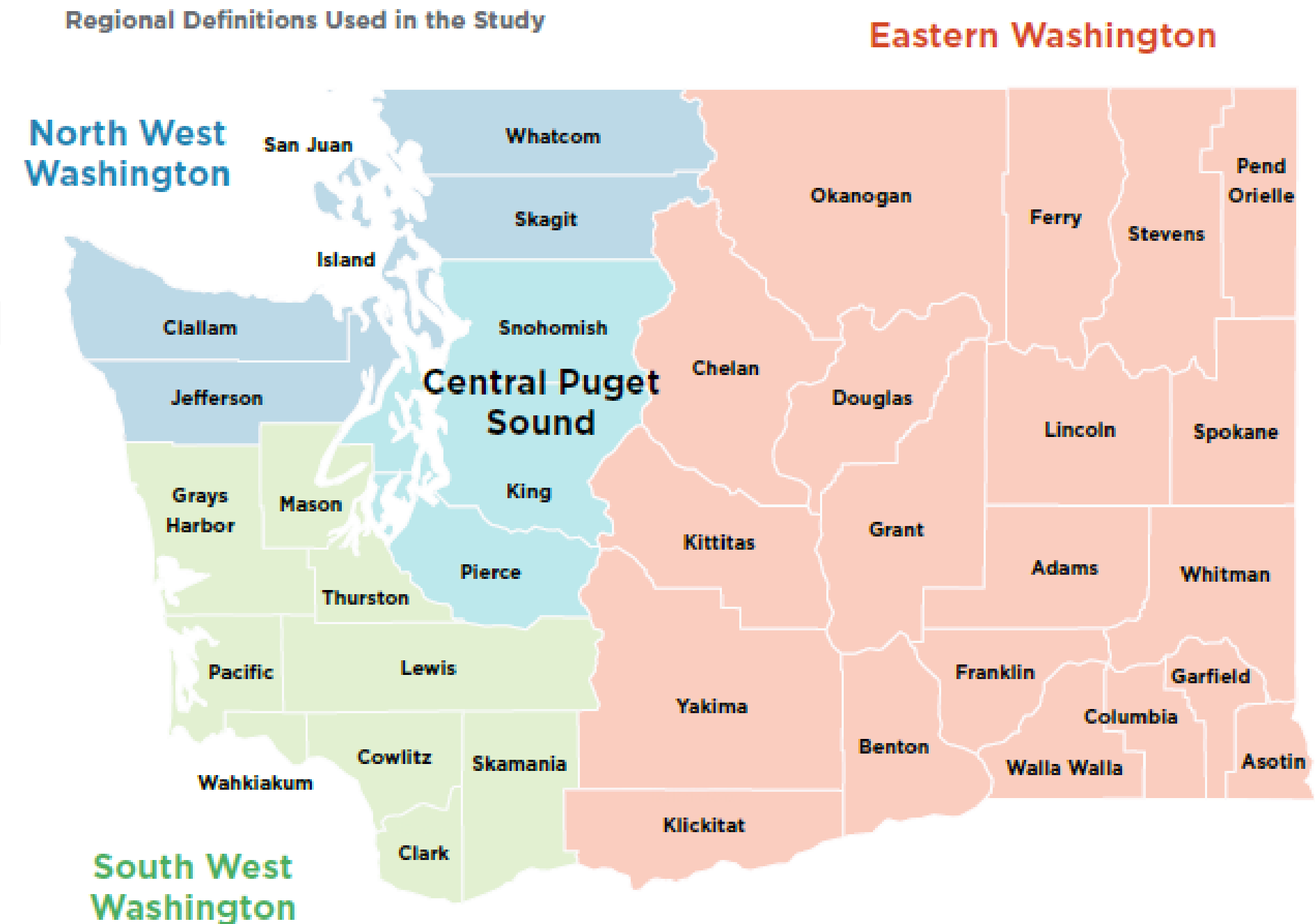
2018 Social Impact Study  
[Artsfund.org/SIS](https://artsfund.org/SIS)



2021 COVID Cultural Impact Study  
[Artsfund.org/CCIS](https://artsfund.org/CCIS)

# OVERVIEW & METHODOLOGY

- **Nonprofit Organizational Survey:** 212 nonprofit cultural organizations from across the state, with 121 reporting financial data
- **Cultural Participant Survey:** 737 adults who had attended at least ONE cultural program since March 2020
- **Statewide Omnibus Poll:** 874 adults from Washington, representative of the state

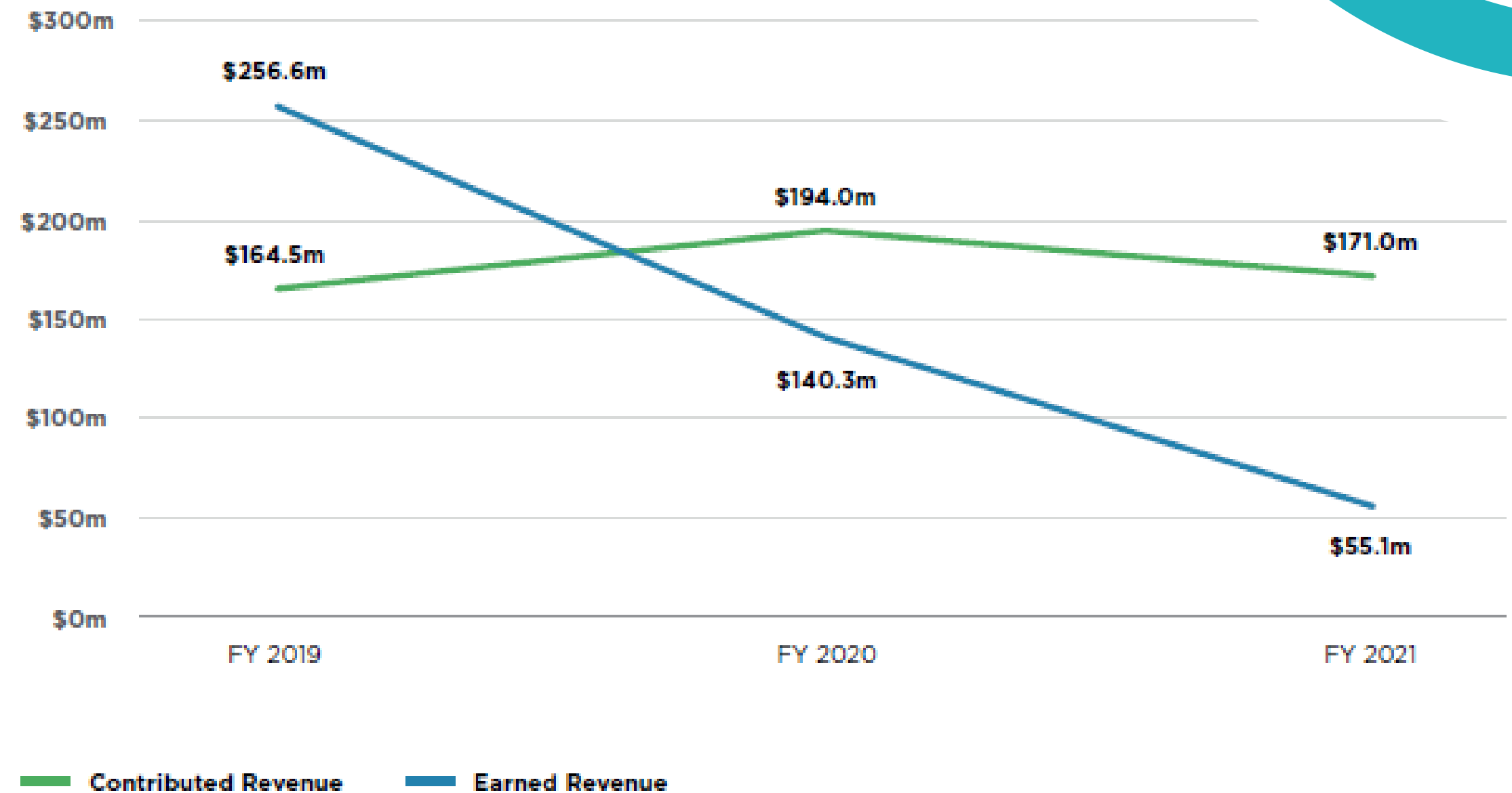


# FINANCIAL IMPACTS

## Revenue & Budget Loss

- **\$95.9M loss** in overall revenue between FY2019 and FY2020.
  - **\$131.6M decrease** in earned revenue and **\$35.7M increase** in contributed revenue.

Nonprofit Cultural Organization Revenue



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



# FINANCIAL IMPACTS

## Patron Spending

- **47%** of statewide poll respondents, say they plan to continue virtual participation in the near term
- They are also expecting to spend about **50% less** of what they spent prior to March 2020



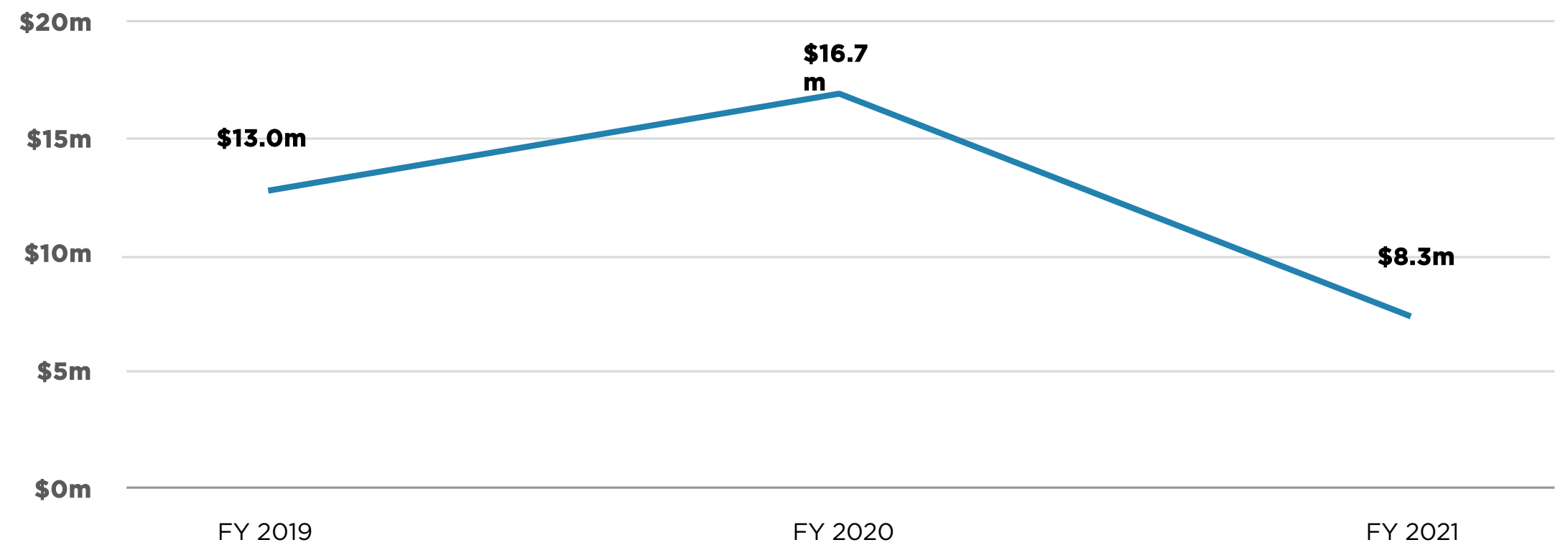


# FINANCIAL IMPACTS

## Impacts on Black, Indigenous, and other People of Color-Identifying Organizations

- **29% increase** in contributed revenue between FY 2019 and FY2020.
- **50% decrease** projected in FY 2021.

Total Contributed Revenue Among BIPOC-identifying organizations



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

# FINANCIAL IMPACTS

## Access to Pandemic Relief

- **93%** of organizations received some type of pandemic relief funding.
- The **top three** relief programs accessed were funded by public sources.

	King	Central Puget Sound (Including King)	Eastern Washington	North West Washington	South West Washington
Average Number of Sources Accessed	4.23	4.12	3.23	4.44	2.75
Nonprofit Community Recovery (NCR) Grants (ArtsFund and the Department of Commerce)	75%	75%	77%	89%	75%
Public Statewide Emergency Relief Funds (e.g. ArtsWA, Department of Commerce, Humanities Washington, etc.)	63%	62%	38%	67%	25%
Paycheck Protection Program (PPP)	63%	62%	23%	44%	38%
Other Local/Regional Emergency Relief Funds (e.g. ArtsFund COVID Emergency Relief Fund, etc.)	50%	48%	38%	44%	25%
Public Local/Regional Emergency Relief Funds (e.g. county or city arts agencies)	54%	49%	8%	44%	0%
CARES Act Relief Funding DIRECTLY from a Federal Source (e.g. IMLS, NEA, NEH, etc.)	39%	37%	46%	33%	50%
Shuttered Venue Operators Grant (SVOG)	22%	21%	23%	22%	25%
Economic Injury Disaster Loan (EIDL)	19%	19%	23%	44%	13%
Employee Retention Credit	20%	21%	0%	22%	0%
Other Statewide Emergency Relief Funds (e.g. All In Washington, etc.)	0%	9%	23%	22%	25%

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



# WORKFORCE IMPACTS

## Furloughs and Rehiring

- **41%** of organizations furloughed full time staff or reduced hours and pay
- There was a decline in volunteers of over **8,000** individuals
- Organizational concerns around cultural “**Brain Drain**”







# SHIFTS TO VIRTUAL PROGRAMMING

## Shifts in Cultural Consumption

- Prior to March 2020, **76%** of cultural participants reported attending cultural programs monthly or more frequently.
- Since March 2020, only **28%** of cultural participants reported attending cultural programs monthly or more frequently

*It is usually a much larger part of my life. I generally attend 2-3 in person events weekly, but everything has switched to online. It's good to have that option, but the connection is not the same.*

Unknown County Cultural Participant



# SHIFTS TO VIRTUAL PROGRAMMING

## Cultural Participation

- **70%** of statewide organizations reported offering significantly more digital programming.
- **18%** preferred to continue to engage remote-only for the foreseeable future.

*I have had the opportunity to participate in cultural events that I never would have been able to attend in person. Cultural programming is becoming more equal and diverse. It has made my life richer and made me feel more connected to people in a time of divisiveness.”*

Snohomish County Cultural Participant



# SHIFTS TO VIRTUAL PROGRAMMING

## Lens on Accessibility

- Nearly **one-third** made accessibility improvements (e.g. offering ASL interpretation, closed captioning, visual descriptions).
  - Of those organizations, **84%** intend to make those changes permanent.





# FUTURE OUTLOOK & OPPORTUNITIES

## Rethinking the Cultural Organization

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

To experience art	69%
Makes me happy/brings me joy	67%
To support a community organization or program	64%
To patronize an organization that I have strong connections to	59%
To participate in your local community/makes me feel connected to my community	53%
To escape/relax	50%





# FUTURE OUTLOOK & OPPORTUNITIES

## Role of Arts & Culture

- **48%** of cultural participants value cultural programming more now than prior to March 2020.
- **32%** of the public value cultural programming more now than prior to March 2020.

*I've had to live largely without it for two years and I've missed it profoundly. My mind, my heart, and my community all feel smaller*

King County Cultural Participant



# FUTURE OUTLOOK & OPPORTUNITIES

## Role of Arts & Culture

- Almost 93% of cultural participants believe that the role arts & culture will play in their communities post-pandemic recovery will be somewhat or very important.

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

Economic recovery for businesses and organizations	40%
Encouraging community unity and vitality	40%
Providing entertainment and escape	37%
Offering inspiration and hope	36%
Creating employment for individuals	32%

# RECOMMENDATIONS

1. Reimagine the role of arts and culture in our communities.
2. Protect the cultural workforce.
3. Center equity.
4. Support the long-term adaptation of the industry.
5. Expand and sustain public support.



# FURTHER RESEARCH

1. **LOCALITY:** As downtown cores have emptied, will cultural centers become more dispersed in neighborhoods?
2. **SPENDING:** How have patron spending priorities changed and how will these changes ripple through the local economy?
3. **WORKFORCE:** Who will return to cultural work? How will the sector find a sustainable way to support and retain the workforce?
4. **FUNDING:** With new streams of funds through public programs and first-time funders, how will the funding landscape change?
5. **RECOVERY:** How will arts and culture be engaged in and leveraged for social and economic recovery?

*“[Cultural organizations are] Catalysts for economic recovery and development as well as providing opportunities for healing and growth.”*

Pierce County, Cultural Participant



# THANK YOU

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