



Findings in response to survey of
Arts Council funded organisations
on impact of COVID-19

Contents

1. Introduction	3
2. Key findings of organisation survey	4
3. Background	6
4. Activities cancelled or postponed	7
5. Response of organisations to changes.....	14
6. Staff Impact.....	16
7. Future risks.....	17
8. Supports needed from the Arts Council	18

1. Introduction

Artists and arts organisations have been playing their part in helping people get through the current crisis – the public response to, and engagement with, this work has been overwhelmingly positive.

The value of the arts has never been more evident.

The arts will maintain this central role in Irish life by contributing to a national recovery beyond COVID-19.

This interim report sets out the findings of a survey carried out with 265 arts organisations in the week of 23–27 March.

The report provides a sense of the scale of the impact of the crisis on the arts sector and the steps necessary to ensure a strong sector emerges out of the COVID-19 crisis.

This work is one part of a **Planning for Recovery** research programme to provide evidence for the design of responsive and targeted actions that will support arts organisations and artists.

A related survey of individual artists is currently being undertaken – and this additional information will also be important in framing decisions in the weeks and months ahead.

Research actions include:

- **Forecasting** based on projected figures supplied by organisations as part of their 2020 funding agreement. Arts Council on 23 March estimated that organisations will lose €2.9 million in income for each month of shut down.
- **Survey of 265 organisations week of 23–27 March** to identify impact on audiences, employment and finances for March, April and May. Survey data estimates economic impact is €10.25 million, which is 18% more than Arts Council forecast on 23 March. We will continue to refine our projections as more data becomes available.
- **Survey of artists 6 April–11 April** to identify detail on cancelled contracts and economic impact on individuals
- Survey of strategically funded organisations on **Revised Plans & Budgeting Process 23 April–1 May** for remainder of 2020 in response to COVID-19.

2. Key findings of organisation survey

The survey of Arts Council funded organisations was undertaken week of 23–27 March. 265 organisations submitted - a response rate of 78%.

Impact on audiences and participants

- Loss of **audiences** estimated at 2.4 million
1 million for street arts and spectacle parades and a further 1.4 million for other activities – including performances, exhibitions, readings, screenings.
- Loss of **participants** from cancelled classes/workshops and participatory programmes estimated at over 55,000.
- 85% of organisations are planning to postpone and provisionally re-schedule some activities later in year/next year and 47% are cancelling some activities outright.

Impact on artists

- 9,000 artist engagements affected by cancelled/postponed activities
- 5,000 artists affected by closed workspaces/facilities or withdrawn services and resources.

Financial impact

- Over 12,000 Activities cancelled – including 3,700 performances and 195 exhibitions.
- Over 112,000 tickets already sold for activities that will not now take place.
- 269 staff have lost their jobs.
- No evidence as yet that insurance cover will provide relief.
- Over €3.85million invested to date in activities now cancelled/postponed
- Potential income of €6.4million lost from activities now cancelled

Top three risks identified by organisations

Response	%
Ability to reschedule re-programme planned activities	72%
Funding / fundraising may be affected	70%
Ability to recover financially	53%

New activities

- Over 65% of organisations have initiated activities specifically in response to COVID-19 in addition to business as usual activities.
- Over 50% of organisations have created or are specifically promoting online content or services.

3. Background

- The survey was issued Monday 23 March. An initial deadline of Wednesday 25 March was extended to end of Friday 27 March.
- The survey was issued to organisations funded through the following programmes in 2020:
 - Strategic Funding
 - Arts Centre Funding
 - Arts Grant Funding (excluding artist recipients)
 - Festival Investment Scheme funding (Round 1, 2020 only)
- Out of the 340 organisations invited to partake a total of 265 submitted - a response rate of 78%.

	Invited	Submitted	Response rate
Strategic Funding	106	101	95%
Arts Centre Funding	44	35	80%
Arts Grant Funding	125	88	70%
Festival Investment Scheme	65	41	63%
Total	340	265	78%

The response rate across funding programmes is reflective of the scale and capacity of organisations funded through these programmes

- This sample can be further viewed through the lenses of both the 'Arts areas' and 'Organisation type' as set out below. Analysis of the findings is broken down by these designations in some of the tables below.
- The key topics covered were:
 - Activities cancelled or postponed and the associated impact on audiences/artists/income
 - How organisations are responding
 - Building related issues
 - Staff related issues
 - Other comments / suggestions
- There were no mandatory fields in the survey other than the organisational profile information. Organisations were asked to tell us what information they could at this point in time, acknowledging the difficult circumstances and the many unknown factors.
- Organisations were asked for information covering the period up to 31 May. Organisations were advised not to include information on events cancelled after that period - even if the decision to cancel had already been made.

4. Activities cancelled or postponed

The Arts Council has estimated that organisations will lose €2.9 million per month based on activities cancelled or postponed. This is based on figures provided by organisations at the beginning of 2020. However, organisations in this survey are reporting that the economic impact is likely to be €10.25 million for March, April and May. This may be because €2.9 million is an annual monthly average and turnover in March, April and May would be in advance of this as spring and early summer programming starts.

Types of activities cancelled or postponed

- We asked organisations - *For the period up to 31 May - What type of activities have you had to cancel or postpone? Only include those that you have made a decision on.*
- Multiple choice responses from 12 options plus an 'other - write in' as well as the option to select 'no activities cancelled'.

140	organisations	(53%)	cancelled	Performances
132	organisations	(50%)	cancelled	Workshops/Training/Classes
100	organisations	(38%)	cancelled	Participatory arts programmes
87	organisations	(33%)	cancelled	Readings /Artists talks / Lectures
84	organisations	(32%)	cancelled	Rehearsals
81	organisations	(31%)	cancelled	The creation and development of new work
72	organisations	(27%)	cancelled	Provision of artists work spaces or facilities
71	organisations	(27%)	cancelled	Exhibitions
63	organisations	(24%)	cancelled	Provision of services or resources for artists / sector
51	organisations	(19%)	cancelled	Screenings
41	organisations	(16%)	cancelled	Conference/seminar
16	organisations	(6%)	cancelled	Publications

- 60 organisations (23%) reported cancelling other types of activities - these included launches, networking and commercial activities.
- 30 organisations (8%) reported no cancelled/postponed activities – these were primarily festivals (with programmes outside of the relevant period) and publishers.
- Multi-disciplinary venues and festivals have the widest range of activity types impacted.

Number of Activities cancelled postponed

- Where activities were cancelled/postponed we asked respondents to tell us the **number** of each type of activity.
- These are presented below broken down by organisation type:

Activity Type	Organisation Type								TOTAL
	Venues	Festivals	Resource organisations	Production company / ensemble	Artists retreats and work spaces	Publisher / publication	Collaborative practice organisation	Young people and children	
Workshops/Training /Classes	1,607	192	517	245	202	12	176	905	3,856
Performances	1,912	967	122	575	12	5	16	84	3,693
Rehearsals	427	257	154	458	36		23	145	1,500
Screenings	1,292	70	1	3	2		2	15	1,385
Participatory arts programmes	264	97	400	47	78	5	43	88	1,022
Readings /Artists talks / Lectures	149	294	128	4	27	91	16	3	712
Exhibitions	102	54	13	1	17	1	2	5	195
Conference/seminar	31	5	10	3	1	3	1	5	59
Publications	3	3	5			21			32
TOTAL	5,787	1,939	1,350	1,336	375	138	279	1,250	12,454

Loss of Audience

- Where cancelled activities were to involve a public presentation respondents were asked to estimate the associated audience and where relevant state the number of tickets already sold.
- Total audience engagements lost reported as follows:

Activity type	No. of Audience engagements lost
Performances	1,739,693
Readings /Artists talks / Lectures	371,701
Exhibitions	250,760
Screenings	63,419
Total	2,425,573

- The estimated audience for performances includes almost 1 million relating to circus, street arts and spectacle events.
- Venues report audience losses of over 700,000. Festivals report losses of over 550,000.
- Tickets sold to date for cancelled or postponed activities are reported as follows:

Organisation type	No. of tickets sold to date
Venues	88,230
Production companies	12,870
Festival	11,763
Total	112,863

- Presold tickets relate mainly to performances but also include over 4,600 for readings/artists talks at festivals.
- In addition to 'audience' member we asked about 'participants' impacted in relation to classes, workshops and participatory programmes:

Activity Type	No. of participants impacted
Participatory programmes	33,211
Workshops/classes/training	21,946
Total	55,157

- The impact on participation is most significant on those organisations working with young people and children as well as resource organisations and venues (these organisations accounted for 73% of all participants impacted).

Artists impacted

- Where activities were cancelled/postponed we asked respondents to tell us the number of **artists** impacted

Activity Type	No. of Artists impacted
Performances	4,372
Rehearsals	1,520
Exhibitions	966
Participatory programmes	737
Development and creation of new work	723
Readings /Artists talks / Lectures	631
Total	8,949

Viewed through the lens of the arts areas the impact across the range of artforms and practice areas can be seen.

Arts team	No. of Artists impacted
Music & Opera	1,996
Festivals (Multi-disciplinary)	1,426
Venues (Multi-disciplinary)	1,138
Visual Arts	1,015
Theatre	669
Literature	596
Dance	554
Traditional Arts	531
Circus, Spectacle, Street Arts	410
YPCE (Multi-disciplinary)	346
Arts Participation (Multi-disciplinary)	221
Other	47

- The survey also asked about where workspaces and facilities had closed or where and services and resources for artists had ceased.

Organisation type	No. of Artists impacted	
	Artist workspaces	Services and resources
Artists residential, retreats and work spaces	819	803
Resource organisation	446	1,619
Venues	285	382
Festivals	464	79
Other	59	366
Total	2,073	3,249

Expenditure and lost income

- Organisations were asked the amount of money they had invested to date on certain activity types now cancelled/postponed. As follows:

Organisation type	Performances	Readings /Artists talks	Exhibitions	Screenings	Conference /seminar	Total
Artists retreats and work spaces	€1,000	€789	€40,019	€1,000		€42,808
Collaborative practice	€15,120	€4,000	€8,250		€2,000	€29,370
Festival	€794,059	€59,170	€28,827	€41,800	€6,600	€930,456
Production company / ensemble	€1,510,257	€4,800	€7,500		€5,000	€1,527,557
Resource organisation	€89,320	€5,500	€5,200		€53,835	€153,855
Venue	€825,310	€6,928	€213,253	€6,810	€3,000	€1,055,301
Young people and children	€83,900		€1,750	€24,604	€6,500	€116,754
Total	€3,318,966	€81,187	€304,799	€74,214	€76,935	€3,856,101

- Those that responded to this question reported investing over €3.8 million. However, organisations reported difficulty in calculating this information. For example out of the 140

organisations that reported cancelling performances 48 did not provide data on investment to date in those activities.

- Where it was felt feasible and relevant to do so, organisations were also asked to report on their expected loss of income arising from cancelled activities. Note- organisations were asked to report loss of income generation as a result of cancelled activities – not the net loss. There were five activity types across which this question was asked. Of the 185 organisations impacted by cancelled activities in these areas - data on loss of income was provided from 137. Total loss of income was reported as almost €6.4M. Broken down by activity type as follows:

Activity Type	Loss of income reported
Performances	€5,086,135
Screenings	€677,737
Publications	€442,566
Readings/Artist Talks	€108,933
Conferences	€79,023
Total	€6,394,394

- Loss of income broken down by organisation type:

Activity Type	Loss of income reported
Venues	€3,779,020
Festivals	€1,423,949
Production company / ensemble	€649,389
Publisher / publication	€416,916
Resource organisations	€54,484
Young people and children	€45,285
Artists residential, retreats and work spaces	€25,350

- We asked organisations - *If relevant - do you know if your **insurance cover** will provide any relief for cancellation of activities?*

Response	Number of responses	%
Yes - (some or all)	1	0.4%
No - (none)	102	39%
Don't know / waiting to hear	78	30%
Not applicable	79	30%

5. Response of organisations to changes

Responding to change

- Organisations were asked - *At this time have you agreed on or adopted any specific strategy or plan in relation to your planned programme / activities? From multiple choice menu*
- 78% of respondent have adopted a specific strategy.
- Of the strategies adopted by respondents:
 - 85% (172) are planning to postpone and provisionally re-schedule some activities later in year/next year
 - 47% (95) are cancelling activities outright
 - 17% (34) are reducing the overall scale of your programme/s - e.g. shorter runs
 - 34% (69) are adopting a range of other strategies – the most predominant being on-line delivery solutions for programmed work

Business as usual

- We asked organisations - *What business as usual activities are you continuing to operate? From multiple choice menu.*

Response	Number of responses	%
Planning and research for future activities / programme	249	95%
Ongoing administrative duties	248	94%
Responding to queries	234	89%
Communications - including social media	232	88%
Creating / developing new work	133	51%
Provision of services/facilities/resources	90	34%
Building maintenance	83	32%
Other	67	26%

New – online activities

- In addition to business as usual activities over 65% of organisations have initiated alternative activities specifically in response to COVID-19. The vast majority of these involve on line responses.

- Over 50% of organisations have created, or are specifically promoting new online content or services. Organisations have provided links where relevant.

6. Staff Impact

- We asked organisations what approaches they had implemented in regard to employees as a way to manage closure of venue/ cancellation of activities. Responses from a multiple choice menu as follows:

Responses	Number of responses	%
Reduced number of hours	33	22.9%
Temporarily laid off staff	28	19.4%
Discontinued contracts	14	9.7%
Staff on unpaid leave	5	3.5%
Staff maintained on reduced salary (while not working)	9	6.3%
Staff on annual leave	7	4.9%
Other - Write In (click to view)	99	68.8%

- Organisations that had laid off staff reported lay-offs totalling 269 staff.
- Majority of those that selected 'other' report working from home.
- Over 20% of organisations report that they employ staff (aside from artists/performers) that only work on the public presentation side of their programme - e.g. invigilators / front of house staff / stewards / security/ bar staff etc. The number of these staff exceeds 1,050.
- Over 70% of organisation report having been able to establish remote working for relevant staff. A further 16% have established partial remote working arrangements.
- Over 140 additional narrative responses provided on challenges relating to staff. Detail still to be analysed fully – but many organisations are very concerned at ability to maintain paid staff particularly those that rely on box office or other commercial activities.

7. Future risks

- We asked organisations what they felt the main risks to their organisation were. Responses form a multiple choice menu as follows:

Response	Number of responses	%
Ability to reschedule re-programme planned activities	185	72%
Funding / fundraising may be affected	181	70%
Ability to recover financially	137	53%
Staff lay-off	71	27%
Restricted access to resources needed	70	27%
Restrictions on travel may affect staff/volunteers	64	24%
Don't have IT infrastructure to support people remotely	22	8%
Other - Write In	74	28%

- Extracts form the list of 'other' issues include:
 - *Cashflow*
 - *Re-engaging and rebuilding trust with audiences when restrictions are lifted*
 - *Organisations whose audiences are not online*

8. Supports needed from the Arts Council

- We asked - *What sort of supports do you most need right now - either from the Arts Council or elsewhere?* The overwhelming response to this related to financial needs but also:
 - To follow through on existing commitments
 - Support financial losses
 - Maintain the ecology
 - Advice and support for governance and HR, staffing issues.
 - Advocacy for the arts sector in light of upcoming challenges

Ends