



National Survey on Federal Emergency Aid Measures and the Arts Sector in Canada
Preliminary Report on the Quantitative Survey Responses

**Conducted by Forum Research Inc. for the
Canada Council for the Arts**

April 2020



Canada Council
for the Arts

Conseil des arts
du Canada



INTRODUCTION

On April 6, 2020, the Canada Council for the Arts, together with Forum Research Inc., launched a survey to ask the professional arts sector how the Government of Canada's recently announced emergency aid measures for Canadian workers and businesses are addressing the consequences of the COVID-19 pandemic. These measures include the Canada Emergency Response Benefit (CERB), Canada Employment Wage Subsidy (CEWS) and the Canada Emergency Business Account (CEBA).

These measures, designed to provide emergency support to businesses and non-profits across all sectors of the Canadian economy, continue to be refined.

The survey was designed to obtain a quick snapshot of whether artists, arts groups and organizations were aware of these emergency aid measures and if they had, or were planning to, apply. It was sent to approximately 30,000 Canada Council clients. **Within 48 hours, more than 7,500 or 27% of respondents had replied.** This preliminary report provides a high-level analysis of the findings. The arts sector overall is highly mobilized and determined to get through the challenges brought by the COVID-19 pandemic as evidenced by its responses.

All quantitative and qualitative data collected throughout this survey will be analyzed and presented in a comprehensive report to be prepared by Forum Research Inc. to be published once available.





PRELIMINARY FINDINGS

- The responses demonstrate a **high level of confidence** that the emergency aid measures announced by the federal government will be helpful. **Sixty-one percent (61%) of all respondents** said that the arts sector will get through the pandemic crisis with the support of the emergency aid measures announced by the government in late March of 2020.
- While visual arts and performing arts are potentially the most affected by the pandemic and are most likely to access the federal emergency aid measures, no subsector or arts discipline will be untouched by the crisis – respondents in all fields of practice indicated that they had or would be seeking support from these programs.

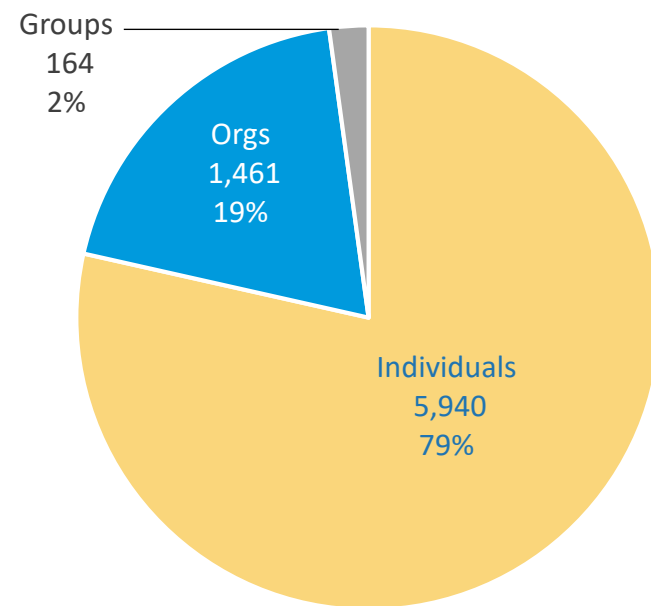




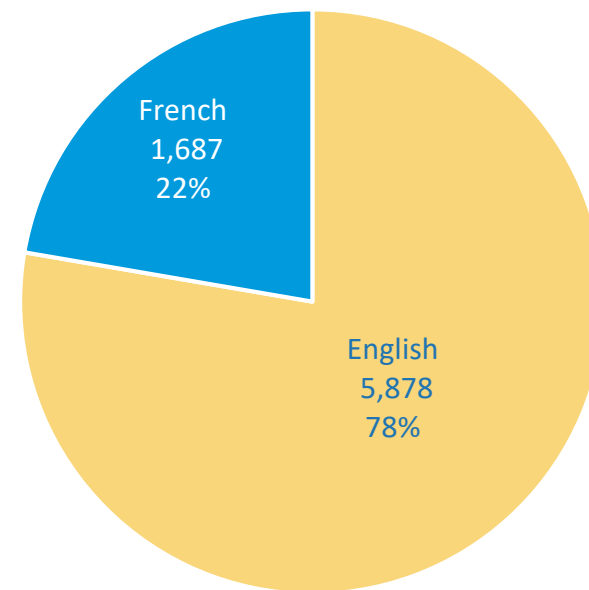
Number of Responses: 7,565

Survey Response Rate: 27%

Responses by Type of Respondent



Responses by Language





Canada Emergency Response Benefit (CERB) – Individuals

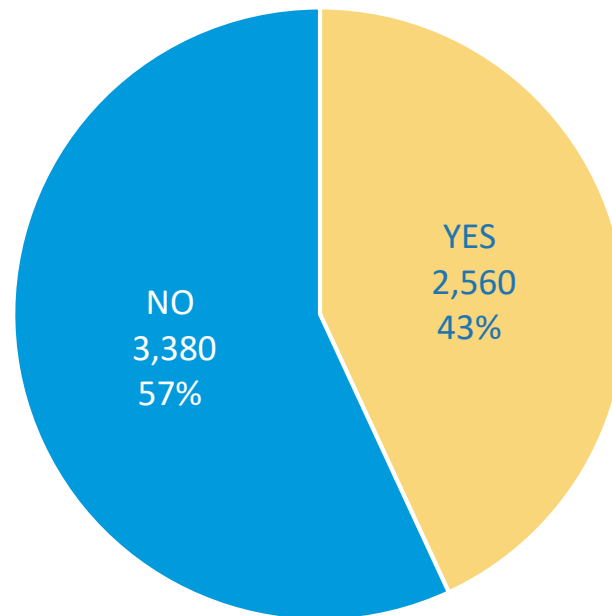
- **Forty-three percent (43%) of individual respondents said they had or would be applying** to the Canada Emergency Response Benefit. Fifty-one (51%) of self-employed artists and cultural workers had or would be applying, whereas only 28% of employed/salaried artists and cultural workers said they would apply, compared with only 8% of artists and cultural workers who were already unemployed before COVID-19 pandemic.
- **Of the 57% who said they would not be applying for the Canada Emergency Response Benefit**, 35% said it was because they were not in need of it, 36% said they thought they were not eligible, 21% said other reasons, and only 7% said it was because they didn't have enough information.





Canada Emergency Response Benefit (CERB)

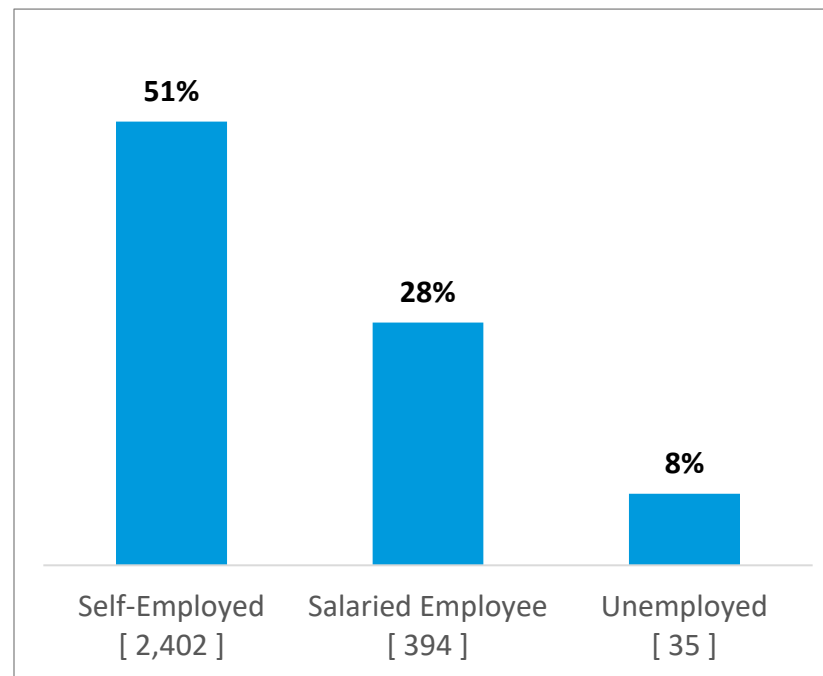
Have you applied or will you be applying for the CERB?





Canada Emergency Response Benefit (CERB)

Employment status of those who have applied or will be applying for the CERB



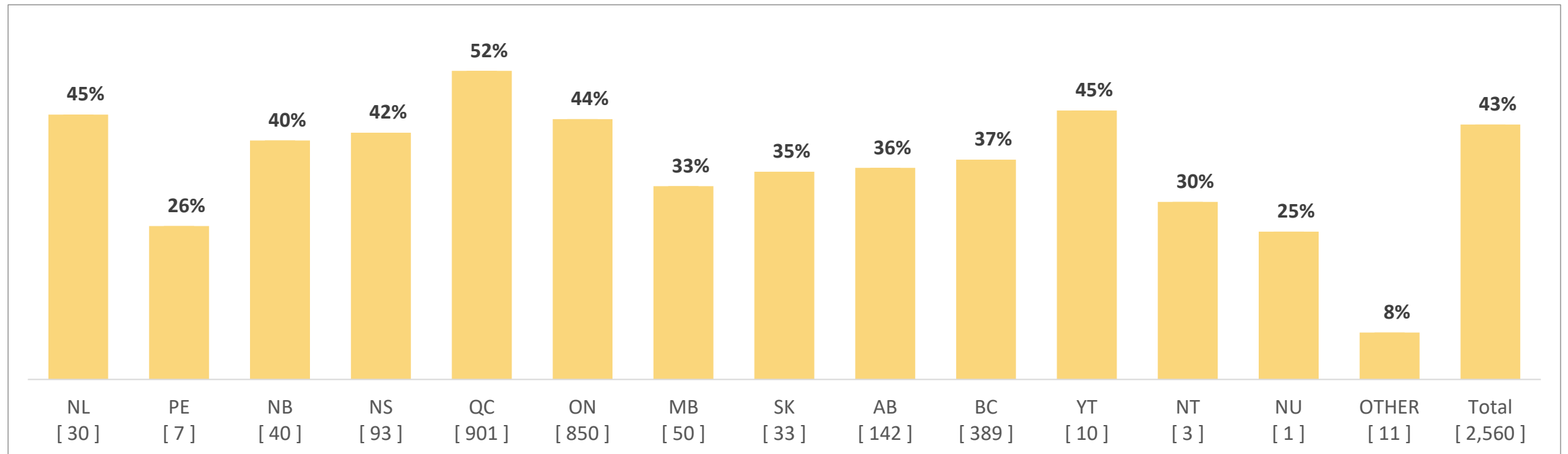
*A respondent may have selected one or more status.





Canada Emergency Response Benefit (CERB)

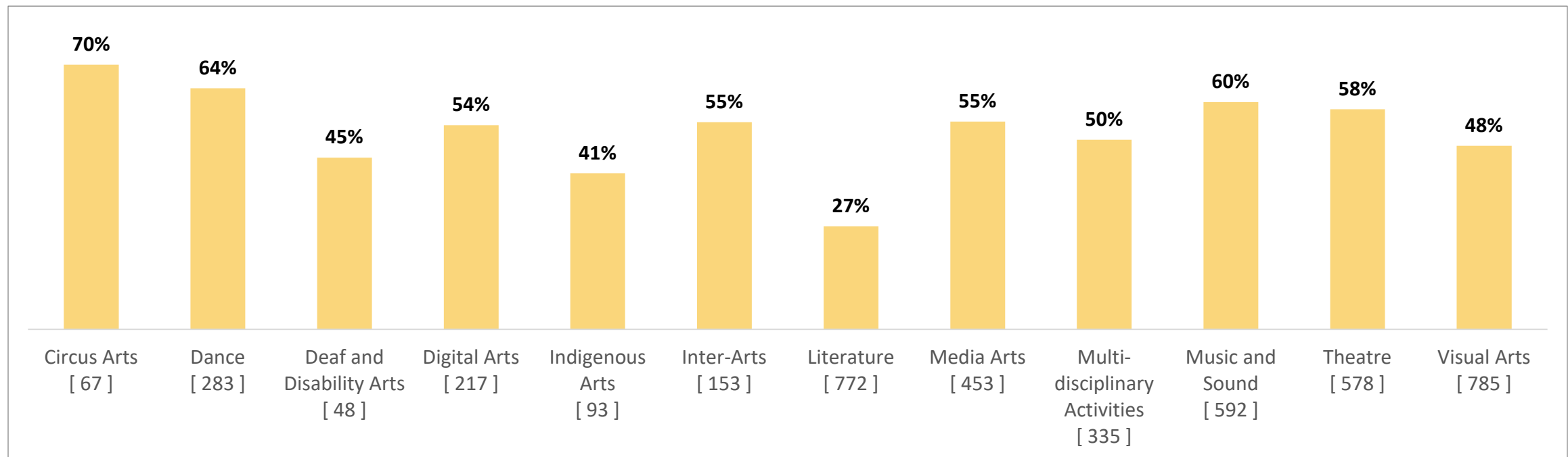
Percentage of respondents in each province or territory who have applied or will be applying for the CERB





Canada Emergency Response Benefit (CERB)

Percentage of respondents in each field of practice who have applied or will be applying for the CERB



*A respondent may have selected one or more fields of practice.





Canada Emergency Response Benefit (CERB)

Key reasons why individuals have not applied or will not be applying for the CERB

Reason	Percentage of Total
I am not in financial need of the benefit	35%
I am not eligible because I have earned employment or self-employment income for at least 14 consecutive days in the initial four-week period	24%
I am not eligible because I did not have an income of at least \$5,000 in 2019 or in the past 12 months	12%
I do not have enough information about this benefit	7%
Other reasons	21%





Canada Emergency Wage Subsidy (CEWS) – Organizations

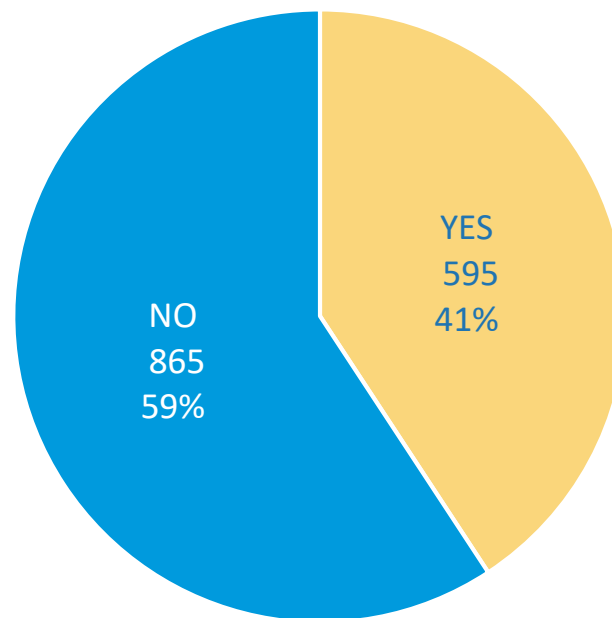
- **Forty-one percent (41%) of respondent organizations said they had or would be applying** to the Canada Emergency Wage Subsidy. Large organizations with revenues over \$1M were much more likely to say they would apply than smaller organizations, particularly those with revenues of less than \$500,000.
- **Of the 59% of respondent organizations who would not be applying for the wage subsidy**, only 7% said it was because their organization would be ceasing their operations as a result of the pandemic. Ten percent (10%) said it was because they didn't need it and 12% said it was because they needed more information on the subsidy. A much greater number (33%) said they would not be applying because they **did not meet the revenue eligibility criteria**, whereas 37% said they had other reasons.
- It should be noted that many organizations in the professional arts sector have a labour force made up of self-employed workers rather than paid employees, and thus will not be able to apply for the wage subsidy. This is concerning as organizations that rely on the services of self-employed artists and arts professionals may not survive the crisis if no other measures are introduced.
- Organizations and groups in all provinces and territories are affected by the pandemic, and have applied or will be applying for the federal emergency aid measures. It is noted, however, that there are variations from one region to another, which can be explained in part by differences in size of organization, operating model (paid employees or self-employed), reliance on earned revenue (e.g., box office, admissions, national and international touring) and levels of public funding from different levels of government.





Canada Emergency Wage Subsidy (CEWS)

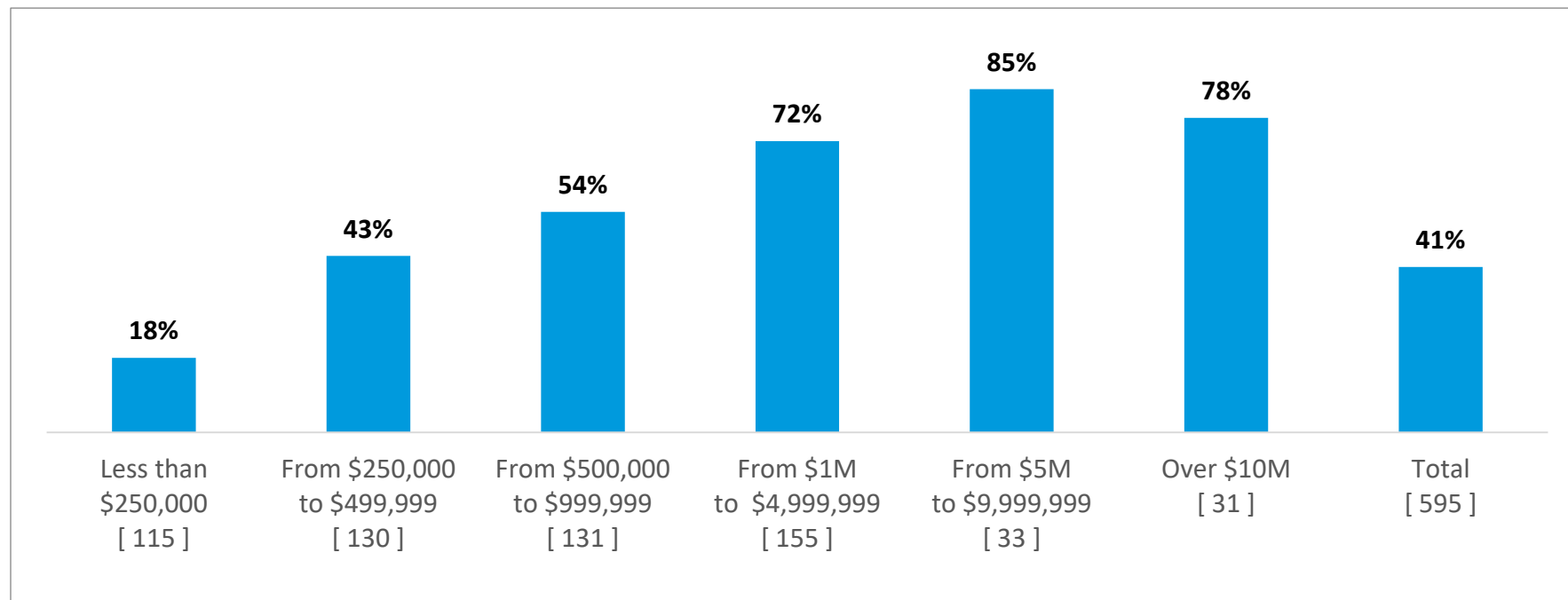
Has your organization applied or will it be applying for the CEWS, which may cover up to 75% of your employees' wages?





Canada Emergency Wage Subsidy (CEWS)

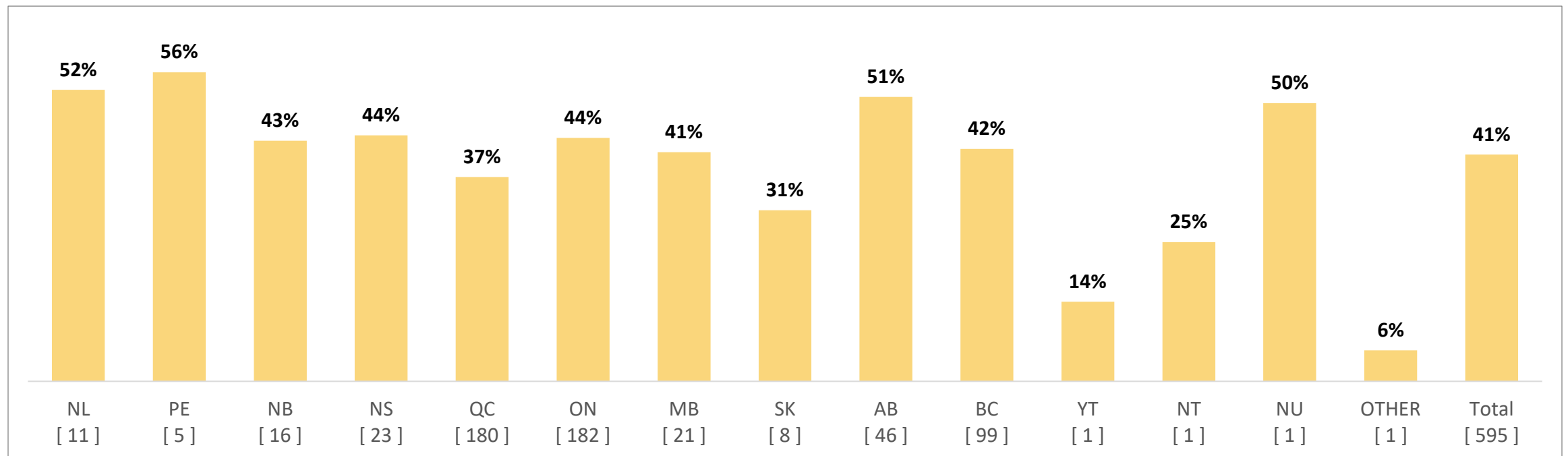
Revenue range of those organizations that have applied or will be applying for the CEWS





Canada Emergency Wage Subsidy (CEWS)

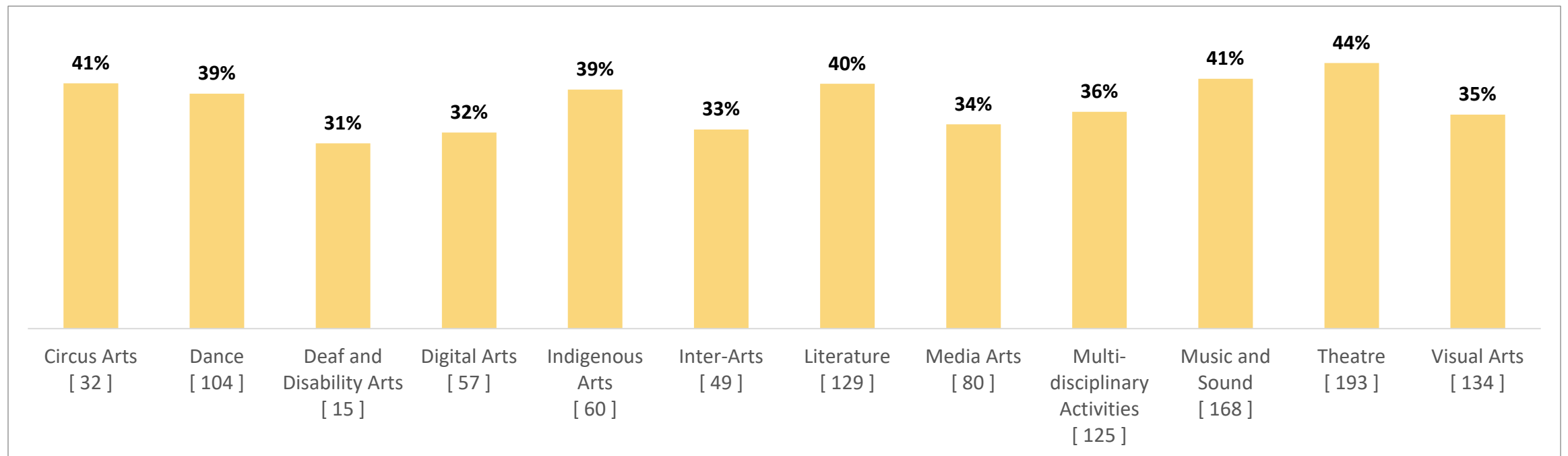
Percentage of organizations in each province or territory that have applied or will be applying for the CEWS





Canada Emergency Wage Subsidy (CEWS)

Percentage of organizations in each field of practice that have applied or will be applying for the CEWS



*A respondent may have selected one or more fields of practice.





Canada Emergency Wage Subsidy (CEWS)

Key reasons why organizations have not applied or will not be applying for the CEWS

Reason	Percentage of Total
My organization or group is ineligible because it will not have a decrease in revenues that meets the requirements of this initiative.	33%
I do not have enough information about this subsidy	12%
My organization or group is not in financial need	10%
My organization or group is ceasing operations as result of this crisis	7%
Other reasons	37%





Canada Emergency Business Account (CEBA) – Organizations

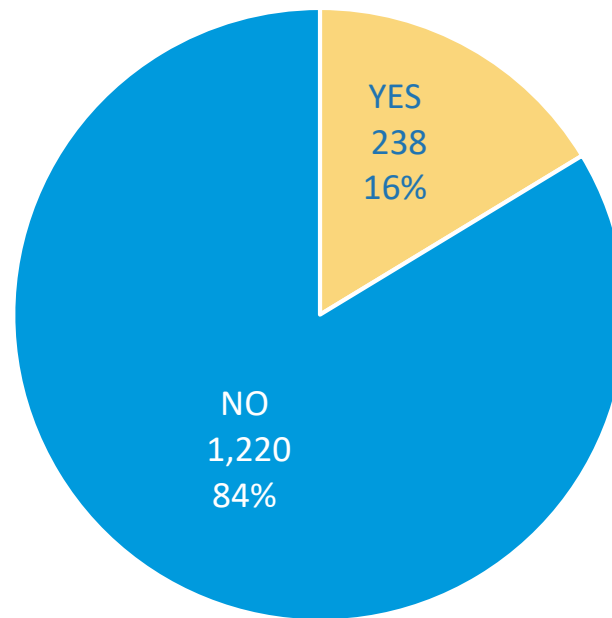
- The Canada Emergency Business Account, designed to facilitate loans of up to \$40,000 for businesses and non-profits is the least likely to be accessed by professional arts organizations. **Only 16% of respondents** said they were planning to access this aid measure. Organizations with revenues between \$1M-\$5M were most likely to say they would apply for the loan.
- It should also be noted that the non-workforce related fixed expenses of arts organizations can be quite elevated, including venue maintenance costs, production costs, contract cancellations, etc.





Canada Emergency Business Account (CEBA)

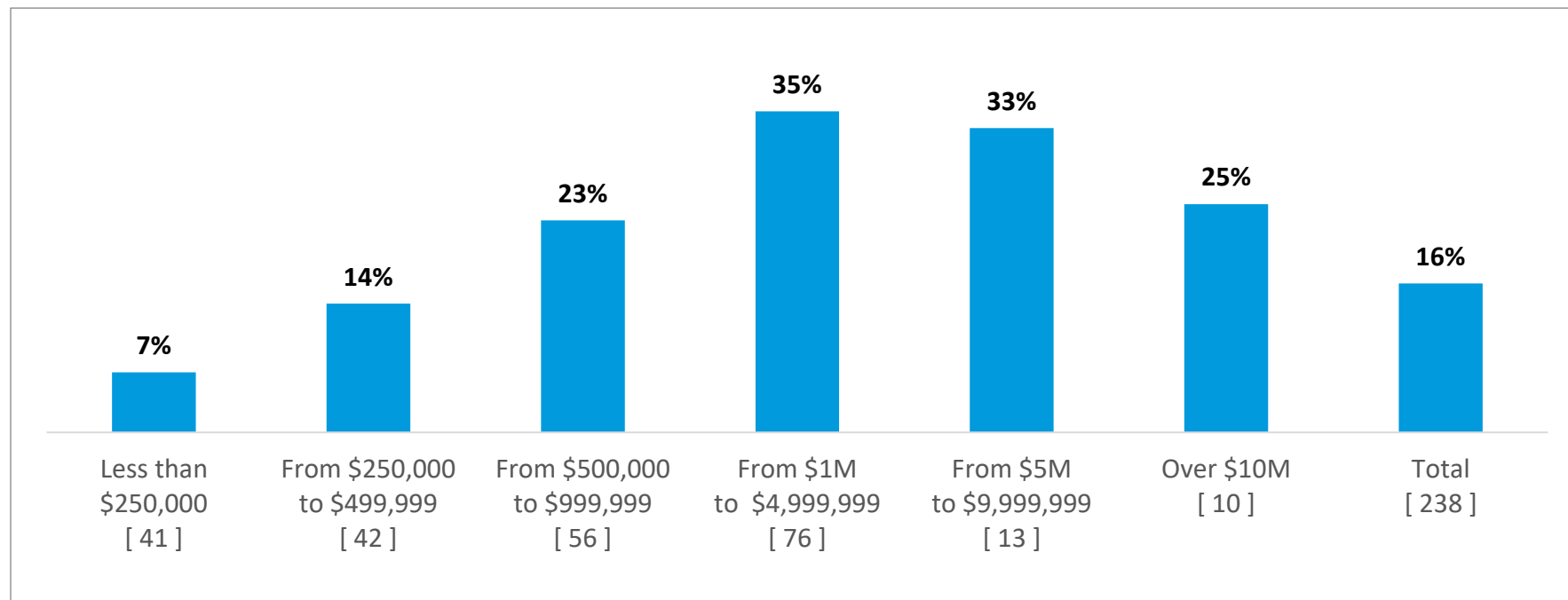
Has your organization applied or will it be applying for the CEBA, through your current financial institution for an interest-free loan of up to \$40,000?





Canada Emergency Business Account (CEBA)

Revenue range of those organizations that have applied or will be applying for the CEBA





Canada Emergency Business Account (CEBA)

Key reasons why organizations have not applied or will not be applying for the CEBA

Reason	% of Total
My organization or group is not eligible	24%
I do not have enough information about this benefit	21%
My organization or group is not in financial need	21%
My organization or group does not have administrative capacity to apply	8%
Other reasons	27%





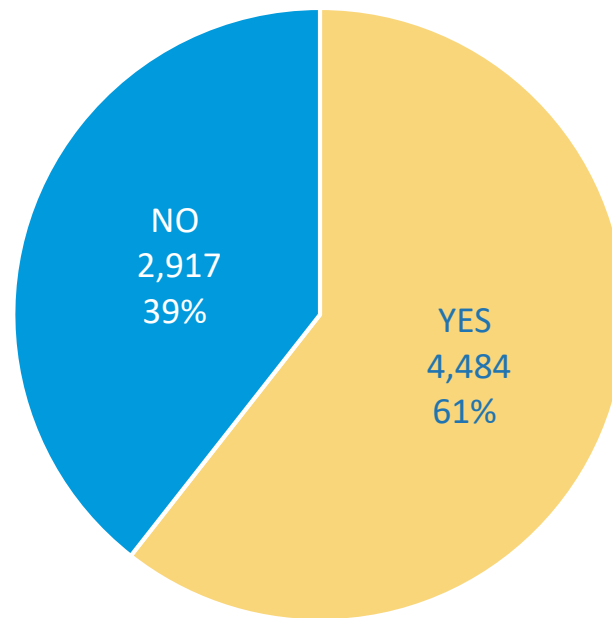
Federal Emergency Aid Measures Individuals and Arts Organizations





Federal Emergency Aid Measures

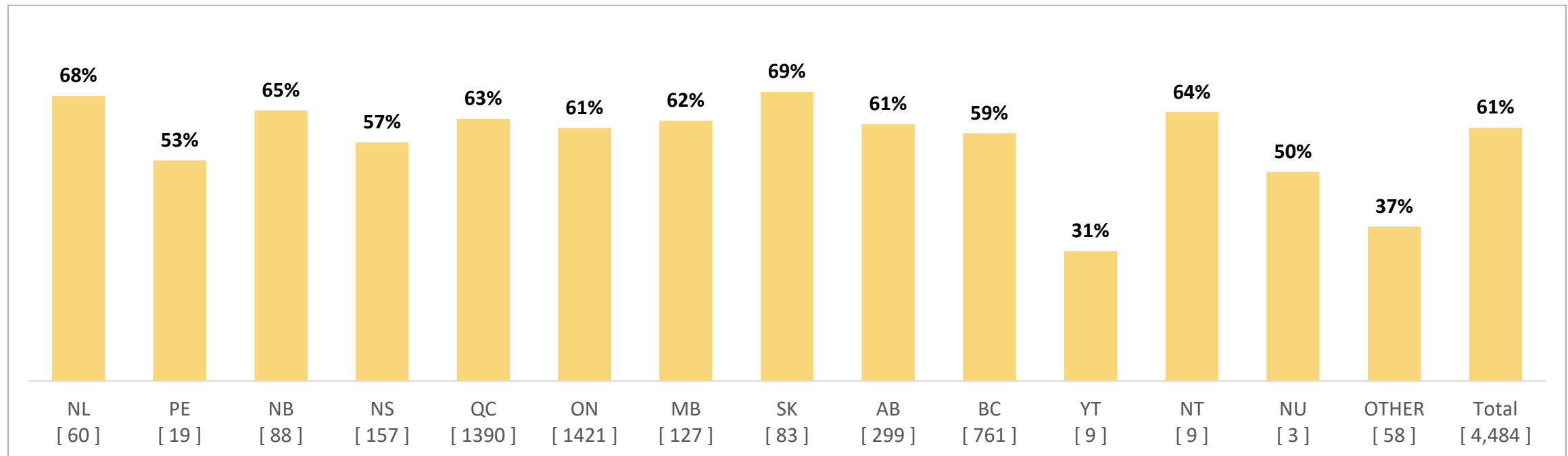
Do you believe the emergency aid measures already announced by the federal government will help you or your organization get through the crisis?





Federal Emergency Aid Measures

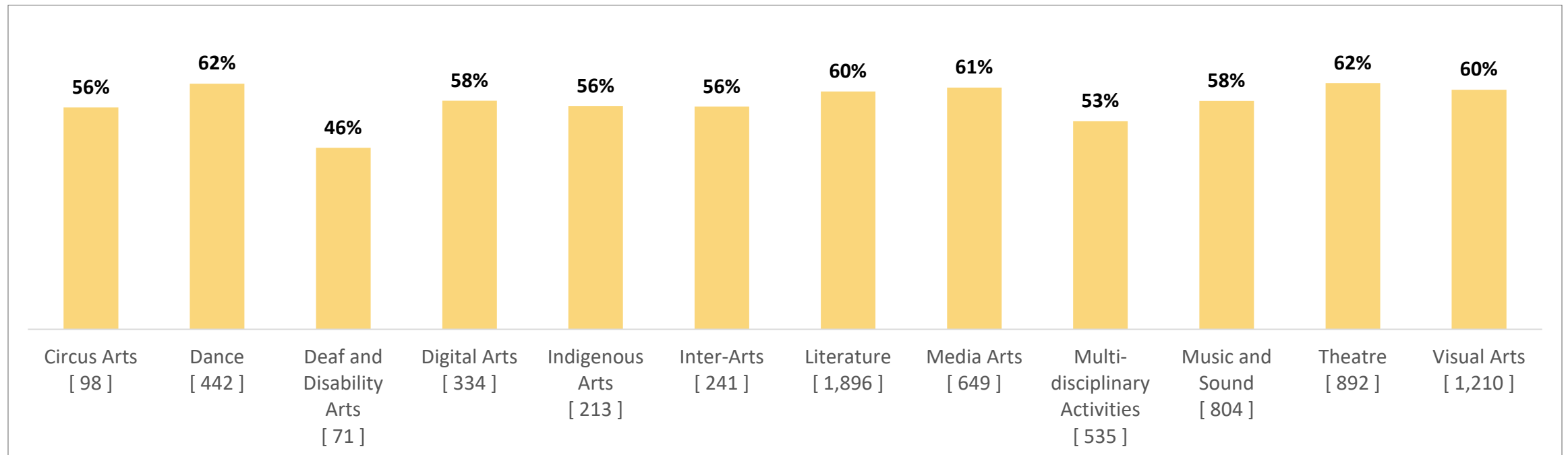
Percentage of respondents in each province or territory that believe the emergency aid measures already announced by the federal government will help them or their organization get through the crisis





Federal Emergency Aid Measures

Percentage of respondents in each field of practice that believe the emergency aid measures already announced by the federal government will help them or their organization get through the crisis



*A respondent may have selected one or more fields of practice.





CONCLUSION

The majority of the survey respondents, and by extension, the wider professional non-profit arts and culture sectors, are confident that the emergency aid measures introduced by the federal government will help them weather the economic consequences of COVID-19 pandemic.

There are certain aspects of the sector that remain at risk. For example, a high number of organizations rely on self-employed professionals and others with an annual payroll less than \$50,000. It should be also noted that many organizations have high fixed costs that are not covered by emergency aid measures such as venue maintenance and production costs. In addition, small and medium arts organizations indicate that they are less likely to apply for loans. Additional measures will be required to help the non-profit arts and culture sector get through this crisis.

Subsequent analysis of the data collected over the entire survey period may shed further light on the situation.

