

COVID Impact Survey

April 2020 ~ September 2020



We Fund
Culture.

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In keeping with its mission and statutory obligations, the SCFD is committed to supporting artistic, cultural and scientific endeavors by financially supporting current cultural activities as well as fostering their growth in the seven-county Denver metro area. To that end, the SCFD has worked to better understand the realities and challenges for its funded partners during the global pandemic. We offer our survey results in hopes they can better inform a larger strategy to ensure our arts, culture and scientific organizations emerge from current public health restrictions able to continue to serve their communities and our state.

SCFD and Sector Snapshot

The SCFD provides funding, through a sales tax district created by voters 30 years ago, to the vast majority of arts and culture non-profits across the entire seven-county Denver metro area. In 2019, the SCFD provided \$65 million in funding to nearly 300 organizations in Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas and Jefferson counties. These organizations ranged from very small, all volunteer non-profits to local and regional organizations to our state's largest cultural attractions.

It's important to note the value of the creative sector to the overall vitality and health of the metro area. Every two years, the Colorado Business Committee for the Arts conducts a comprehensive study of the value of the organizations funded by the SCFD in both economic and quality-of-life contributions. In 2018, the study's most recent year, total economic activity, which comprises direct and indirect spending from operations, audiences and capital projects, reached the highest amount ever reported as did economic impact from cultural tourists.



Learn more at scfd.org

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Data provided to SCFD in required reporting by funded organizations in 2019, shows additional growth in economic contributions and community impact including:



\$19.7 million
in payroll taxes

\$8.2 million
in seat/sales taxes



15.4 million
people in
attendance



12,400
full-time, part-time
and contract jobs

44,910
volunteers



1.8 million
volunteer hours



Levitt Pavilion Denver,
Ruby Hill Park (2019)

Learn more at scfd.org

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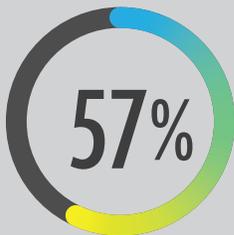
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COVID Survey #1: The picture from mid-April 2020



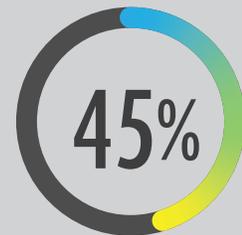
With stay-at-home orders in place for just over a month, the SCFD surveyed its funded partners to develop a snapshot of their various situations early in the public health emergency. The self-administered, online survey was conducted over five days. It asked organizations 21 questions including organizational size, budget and numbers of individuals served in their community and the region. Questions also focused on the impact of recent closures and cancellations, the ability of the organizations to weather these closures over time and their access to resources and supports to help. Ultimately, 275 currently and recently funded organizations responded with the following highlights:



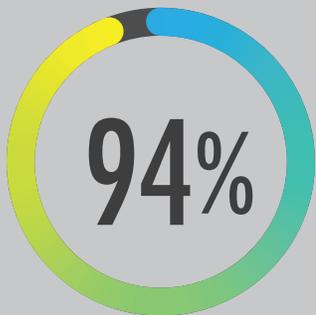
57% reported four months or less of operating reserves. Most went entirely dark and many lost their performance season, or canceled their major annual event, in the case of festivals.



60% reported a decrease in non-admissions income with an additional 35% anticipating it in the near term. Only 5% don't expect a decrease.



45% responding have already made temporary staff reductions. 21% of those organizations fear the staff reductions will become permanent.



94% of the organizations responding expected the current situation to be moderately severe or very severe for their organization.



60% reported being only moderately confident or not confident at all that their organization would survive.



COVID Survey #2: The picture in September 2020

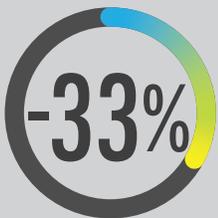


With various public health restrictions in place across the Denver metro area for more than six months, the SCFD surveyed its funded partners for a second time. Again, the survey was self-administered online and was conducted over eight days. It asked organizations 28 questions including organizational size, budget and numbers of individuals served in their community and the region. Questions built on the initial survey to more fully explore the economic and community impact the current public health crisis has had on arts and culture organizations from across the metro area. For this survey, 244 organizations responded. With the following key takeaways:



For more than **80%**, the financial impact has been moderately to extremely severe

For **60%**, the earned revenue loss as been significant to near total



About **one third** of creative sector jobs have been lost to layoff, furlough or elimination

Almost **three quarters** of respondents were only moderately confident or not confident at all that they would survive



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Types of Organizations Responding

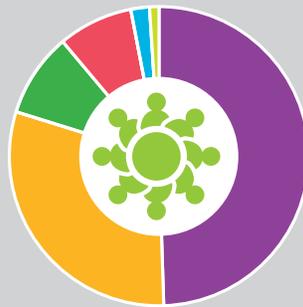
244 TOTAL RESPONDANTS

TYPICAL BUDGET



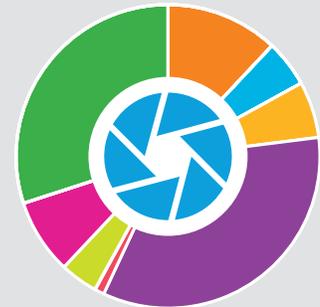
- Less than \$24,999 (6%)
- \$25,000 to \$99,999 (30%)
- \$100,000 to \$249,999 (18%)
- \$250,000 to \$499,999 (15%)
- \$500,000 to \$999,999 (11%)
- \$1,000,000 to \$4,999,999 (12%)
- \$5,000,000 to \$9,999,999 (5%)
- \$10,000,000 and above (3%)

TYPICAL COMMUNITY REACH



- 9,999 or less (49%)
- 10,000 to 49,999 (30%)
- 50,000 to 99,999 (9%)
- 100,000 to 499,999 (8%)
- 500,000 to 1 million (2%)
- More than 1 million (1%)

DISCIPLINES

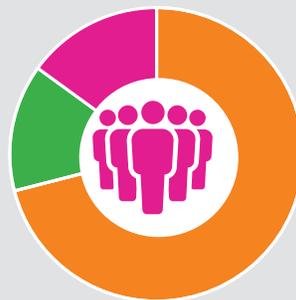


- Art (12%)
- Cultural History (5%)
- Dance (6%)
- Music (34%)
- Natural History (1%)
- Natural Sciences (4%)
- Theatre (8%)
- Multi-disciplinary (30%)



Platte Valley Players,
Adams CO

PEOPLE TYPICALLY EMPLOYED



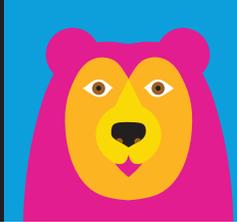
- 99 or less (71%)
- 100 to 499 (14%)
- All volunteer (15%)



Morrison Museum,
Morrison, CO

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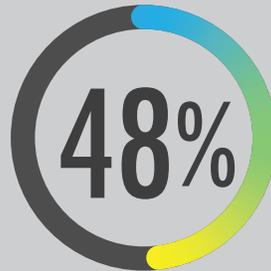
Topline Survey Results



What is the current sector workforce status?

Organizations funded by SCFD reported **12,400** positions in their workforce in 2019 including full-time, part-time and contract work. The survey found:

- **3,435** positions furloughed or laid off
- **542** positions eliminated
- **3,977** total jobs impacted or one third of the total jobs reported in 2019



What is the current financial picture for organizations?

- Nearly half (**48%**) have four months or less of reserves on hand
- **52%** have five months or more



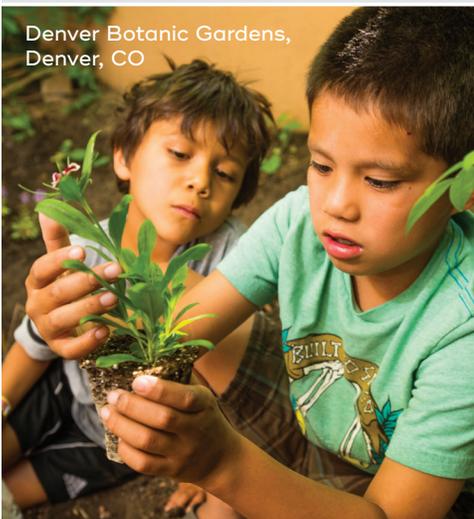
What is the current status of organizations?

- **45%** responding have kept their physical location closed
- **93%** with open facilities are operating at **50%** capacity or less
- **40%** with open facilities will need to either reduce capacity for winter or close their facility



What type of revenue loss have organizations experienced?

- **60%** responding have experienced a significant or near total earned revenue loss with an additional **34%** reporting some earned revenue loss
- **21%** responding reported a significant or near total contributed revenue loss with an additional **57%** reporting some contributed revenue loss



Denver Botanic Gardens, Denver, CO



Highlands Ranch Cultural Affairs, Highlands Ranch, CO

Learn more at scfd.org

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Topline Survey Results



What has happened to expenses during this period?

- 55% responding have seen an increase in expenses due to COVID safety requirements
- 49% responding own, lease or rent their facilities or have ongoing maintenance responsibilities for them they can't renegotiate
- An additional 4% share responsibility for their facilities with cities also impacted by the pandemic recession

What are organizations' top financial concerns?

- 1 Limited savings or operating revenues
- 2 Reduced philanthropic giving
- 3 Cancelled contracts
- 4 Inability to make payroll



Mexican Cultural Center
Denver, CO



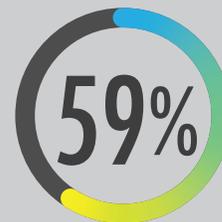
Has virtual programming helped?

- 74% of respondents reported they have been only moderately successful or not at all successful in increasing online engagement
 - 75% said they have had moderate to no success in monetizing their virtual efforts
- * 201 organizations responded they had pivoted to virtual engagement
- * 85 organizations responded they had attempted to monetize that engagement



How severe is the financial impact?

- 86% of organizations reported they have experienced a moderately severe or extremely severe financial impact due to the pandemic
- 36% severe and 49% moderately severe



How confident are organizations they will weather the national public health emergency?

- 59% were moderately confident of organizational survival
- 8% were not confident at all