Culture in Crisis

Impacts of Covid-19 on the UK cultural sector and where we go from here

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Acknowledgements and credits
This report summarises the findings of one of the world’s largest investigations into the impacts of the Covid-19 pandemic on the cultural industries.

Our research was conducted over 15 months, from September 2020 to November 2021. It involved an interdisciplinary project team of 35 people, drawn from 10 universities and independent research organisations, and incorporated the following methods and strands: quantitative analysis of the Office for National Statistics’ Labour Force Survey; five waves of a UK-wide population survey regarding attitudes to cultural engagement; case study and organisational analysis based on over 230 interviews with sector professionals from English theatre, Scottish festivals, Welsh screen and media industries, northern English museums, galleries and visual artists, as well as emerging cultural leaders in Northern Ireland and recent creative graduates; interviews and placements with funders and policymakers; social media analysis; an ecosystem analysis of Greater Manchester; and a two-day conference held in November 2021.

The study was led by the Centre for Cultural Value, funded by the Arts and Humanities Research Council (AHRC) through the UK Research and Innovation (UKRI) Covid-19 Emergency Fund and undertaken in partnership with the Creative Industries Policy & Evidence Centre (PEC) and The Audience Agency (TAA). The research provided an important source of information to policymakers in real time. Findings were regularly reported to and policy implications discussed with the Department for Digital, Culture, Media and Sport (DCMS), the Scottish Government, Welsh Government and Northern Ireland Executive, local and combined authorities, funders, and sector professionals through regular briefings and via a policy reference group.

As we write in November 2021, the pandemic is still very much a part of our everyday lives and the longer-term implications of our research are still emerging, but it is already clear that the pandemic and the public health measures taken to address it have had a significant impact on the arts and cultural sector in the UK. Governments, arts and cultural practitioners, organisations, audiences, funders and policymakers have struggled to adapt to both the lockdown and the stop-start nature of the reopening. As Anthony Sargent’s 2021 report co-published by the Centre for Cultural Value notes, the pandemic has impacted the creative and cultural industries more globally and traumatically than any other crisis in living memory. It has wrought a seismic shock across the cultural sector in particular. But as Anthony also argues, “as always – amongst the loss and damage there has been invaluable learning of new kinds of thinking, new ways of doing things. We need to identify all those new learnings around the world, then build on those new foundations rather than just reassembling the broken pieces from the past.” It is in this spirit of fostering positive change that we have scoped and developed this report.

The longer-term impacts of the pandemic on the sector are still unclear, as are the appropriate, evidence-led responses that will be required from funders, policymakers and the cultural sector itself. What is already clear from our research is that the impact of the pandemic has aggravated and accelerated existing inequalities and longer-term trends across the arts and cultural sector.

These insights suggest that it is vitally important for all interested parties to take both a long-term and evidence-based approach to decisions that need to be made to best support the sector’s recovery. There are real risks that inadequate interventions could exacerbate existing exclusions and further accelerate negative trends, particularly in the context of consumption and production inequalities. Tempting though it may be to pivot to digital to attract new audiences or to plan “safe” artistic programmes, these are two obvious examples of where investment and other policy decisions might result in less-than-effective outcomes in the longer term.

This report is structured as follows: We start with an infographic detailing the methodology used to collect the data for the project. We then offer a chronological analysis of the impacts of the pandemic, which we break down into three main phases: Phase 1 (March–Autumn 2020); Phase 2 (Autumn 2020–Spring/Summer 2021); and Phase 3 (Summer–November 2021). Phase 1 covers the immediate impacts of the pandemic on the sector, including the national lockdowns. Phase 2 covers what the British media often referred to as waves 2 and 3 of the pandemic, which were characterised by repeated lockdowns and related measures depending on different countries, regions, tiers and zones. Phase 3 covers the UK’s tentative re-emergence from lockdowns and restrictions, and addresses longer-term impacts and the slow shift to living with Covid-19 as an endemic.

These phases are certainly not meant to be definitive or fixed: we know that different regions, for example, experienced lockdowns at different times and to differing degrees. Rather, we wanted to propose a loose chronological framework that might offer a sequential review of what happened over a set period of time and provide a useful historical analysis for years to come. Each phase of the pandemic is given its own section which includes a summary of the main policy context or interventions during that timeframe, then an analysis of the impacts on the cultural workforce, audiences and organisations.

The fourth section of the report presents a representative sample of short case studies based on our interviews with cultural organisations and freelancers. The final section reflects on our findings in the round, exploring and reviewing the key themes and highlighting the implications for key stakeholders. It includes a rich and critical discussion of the most recurrent themes that emerged from our analysis, including: digital production, distribution and engagement; vision and mission development and the pivot to civic engagement; the impacts on the diversity of the cultural workforce; the impacts on freelancers; implications for skills and training; and cultural funding, networks and ecologies. The report concludes with a number of reflections on the core implications for cultural practitioners, policymakers and funders.

Please see here for the full Executive Summary of this report.

“Places with a history of obtaining public investment – and the arts and cultural organisations based in those places – benefited most from the Culture Recovery Fund.”
Audience analysis

An ongoing nationwide longitudinal panel survey by The Audience Agency, called the Cultural Participation Monitor, shows changing views about participating in creative and cultural activities through the pandemic and beyond.

This research:
- Samples the whole UK population
- Covers all sectors
- Shows change over time

Cultural sector analysis

Workforce analysis
Quantitative analysis of the Office for National Statistics’ Labour Force Survey over...

Case study and organisational analysis
Based on over 230 interviews with sector professionals, including freelancers, and recent creative graduates

Social media
Quantitative analysis of 9,000 tweets
Qualitative analysis of 450 tweets

30 months

Wave 1
Oct–Nov 2020
6,055 responses

Wave 2
Feb 2021
1,503 responses

Wave 3
June 2021
2,002 responses

Wave 4
Sept 2021
2,025 responses

Wave 5
Nov 2021
6,057 responses

Policy engagement
Live findings and policy implications discussed with policymakers and funders throughout:

Creative Industries Policy & Evidence Centre (PEC) freelancers campaign and industry panel, Spending Review submission

4 briefing meetings with the Department for Digital, Culture, Media and Sport (DCMS)

Regular submissions of evidence to APPGs and government inquiries

6 placements with Creative Scotland

Greater Manchester cultural ecosystem

Cultural ecosystem analysis of Greater Manchester. Through interviews and research this strand assessed the impact of the crisis on business models, funding and strategic policy development, as well as the impacts of government intervention packages.

How we did it
In March and April 2020, the UK Government brought forward a series of unprecedented economy-wide financial support packages directed towards workers, businesses and organisations, including the Coronavirus Job Retention Scheme (“furlough”), Self-Employment Income Support Scheme (SEISS) and a suite of grants and loan schemes.

It quickly became clear that there was a lack of understanding about the make-up of the cultural workforce, which ultimately resulted in support being poorly targeted, with many cultural freelancers “falling through the cracks” and unable to access pandemic support.

Significant easing of restrictions was not seen until July 2020, by which time considerable policy divergence had emerged between England, Scotland, Wales and Northern Ireland. Cultural venues in Northern Ireland and Scotland reopened in early July 2020, while England introduced a tiered alert system, which saw venues reopen in mid-August 2020.

To much relief, in July 2020 DCMS announced a £1.57 billion Culture Recovery Fund (CRF) – the single largest investment in the creative and cultural sectors ever made in the UK. CRF Round 1 (of three), which incorporated the Capital Kickstart Fund and the Emergency Grassroots Fund, saw approximately £485 million allocated to 2,214 cultural organisations. In addition, all four nations worked closely with their respective arts councils and arm’s-length bodies to create emergency support programmes to further support the cultural workforce and organisations.
Impact on audiences

Key findings from Wave 1 of the Participation Monitor

Approach and ambitions
The Audience Agency undertook a nationwide longitudinal (ongoing) panel survey of changing views about participating in creative and cultural activities through the pandemic and beyond, calling the Cultural Participation Monitor. Our ambitions for this were: to gain an understanding of how the Covid-19 pandemic was affecting creative and cultural participation, both online and in person, across the whole UK population; to log changes in behaviour as they happened; and to predict, if only tentatively, long-tail and lasting change.

This was reflected in our research design which consisted of four main themes: in-person engagement, participation*, digital engagement and impacts of inequality. Within these contexts, we invited respondents to reflect on their habits pre-pandemic, during lockdown, and into the future. Importantly, the sample enabled us to conduct analyses based on demographics, region and Audience Spectrum profile. Surveys were carried out in five “waves” from October 2020 to November 2021.

Initial findings: Wave 1, October–November 2021

In-person engagement
Unsurprisingly, lockdown resulted in large drops in cultural engagement, particularly in arts and film outside the home. Heritage sites saw a substantial drop, but to a lesser extent. The proportion of people who had engaged in any in-person arts activity dropped from 85% in the year before to 33% in the seven months from the beginning of lockdown, despite some limited arts activity being available during the summer months.

An important aim was to be able to offer up immediate and actionable intelligence to a sector suddenly hungry for audience insight, as well as to contribute to the wider study and its emphasis on inequality and universal learning gleaned from an unprecedented hiatus.

Baselines
As other populations studies have demonstrated, we saw that a significant proportion of the population does not engage with formal, “organised” culture as offered by our major cultural institutions: 15% had not taken part in any of a list of 15 different arts, cultural and heritage activities in the year before Covid-19 hit (e.g. attended films, live music, plays/dramas/musicals, outdoor festivals, children/family events or visited a museum, historic house, exhibition or collection of art and so on). Those who were more likely to have participated were often older, professional, had children and were based in larger cities (especially London), in line with what we would expect from existing studies such as the Taking Part survey.

Participation
During the initial months of the pandemic, participation levels also dropped for most activities. This was expected for out-of-the-home activities (e.g. visiting a library) but also applied to those that could be done at home (e.g. playing a musical instrument). The one activity that saw a large increase in participation was reading for pleasure (rising from 48% to 65%). As a result of this, the proportion of the population who had participated in at least one of these activities in the seven months from March 2020 was the same as the proportion who had done so in the whole year before the pandemic.

Most arts participation fell, but reading rose: same % participating overall

Digital engagement
The breadth of digital engagement with arts and culture also fell in the first months of the pandemic (although here, as elsewhere, we are comparing seven months with 12 months of activity).

Digital engagement fell in the first months of the pandemic

Large drops in arts engagement, but less for “Heritage”, none for “Any Leisure”

<table>
<thead>
<tr>
<th>Activity</th>
<th>% 12 months before</th>
<th>% since lockdown (Wave 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Leisure</td>
<td>92%</td>
<td>61%</td>
</tr>
<tr>
<td>Film</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Visual Arts</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Literature</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Outdoor Arts</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Performing Arts</td>
<td>99%</td>
<td>99%</td>
</tr>
<tr>
<td>Other Arts/Ents</td>
<td>2%</td>
<td>12%</td>
</tr>
<tr>
<td>Heritage</td>
<td>66%</td>
<td>59%</td>
</tr>
<tr>
<td>No Leisure</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>No Arts or Heritage</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>No Arts or Leisure</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

1 Where “in-person” means attending (performing arts events, museums, galleries etc. – i.e. being a visitor or spectator), and participation means “doing” an activity: making art works, playing or performing for example (but also includes active engagement in literature - i.e. reading and writing).

2 Full methodology including sample sizes etc. is given here.

3 Where “in-person” means attending (performing arts events, museums, galleries etc. – i.e. being a visitor or spectator), and participation means “doing” an activity: making art works, playing or performing for example (but also includes active engagement in literature - i.e. reading and writing).

4 Full methodology including sample sizes etc. is given here.
Impacts of inequality
We asked survey respondents about the impact of the pandemic on their time (whether they had more, less or about the same) and also on their finances (whether their income and expenditure had gone up or down and which had changed more). The latter allowed us to work out an overall “more/less/about the same” for money too.

The financial impact of the pandemic was particularly hard on those from structurally disadvantaged groups, for example those who were younger, in routine or semi-routine manual occupations, were disabled, or were from Black, Asian or mixed backgrounds. The impact in terms of time was a little more complex. Here, advantaged groups were more likely to be able to carry on as normal; having either more or less time was linked to the disadvantaged groups (e.g. from losing work, or having to work longer). In some cases, these disadvantages in terms of time and money were offset by lower health risks (e.g. for those who were younger), but for many others (such as those from Black backgrounds and disabled people) these factors was further compounded the negative impacts of the Covid-19 pandemic.

The overall picture was of a great variety of mostly negative experiences, but greatly mitigated for those with the most pre-existing advantages (who were disproportionately represented among the 23% who said they had more money as a result of the pandemic).

These inequalities were reflected in people’s cultural engagement. Structurally advantaged groups not only tended to engage more than structurally disadvantaged groups before Covid-19, but in many cases the gap actually widened during the course of the pandemic. There are a couple of exceptions worth noting: Black, Asian and mixed ethnicity respondents were relatively more likely to attend in-person cultural activities during the pandemic, but relatively less likely to engage in participatory activities (despite having been more likely than average beforehand). A higher proportion of young people said they engaged in participatory activities before Covid-19 but this proportion switched to older respondents during it.

The effect of age
Throughout the pandemic, we have seen that age has been one of the largest factors affecting attitudes and behaviours. This has not just been because of existing differences in people’s cultural engagement or even vaccination status (which was, of course, dependent on age bands). Instead, there are different tastes (in terms of both content and format), attitudes to risk, and levels of engagement. One notable difference has been a much greater drop in engagement levels among older people:

![Engagement decreased more quickly with age during Covid-19](image)

The proportion of 16–24s attending in the seven months from March 2020 was just under a half those attending the year before Covid-19 hit; for over 75s this was down to almost a quarter. The difference by age increased from just 11 percentage points before the pandemic to 28 during.

Impact on the workforce

Key findings from quantitative analysis

The Covid-19 pandemic and the public health measures introduced to reduce virus transmission had a major impact on those working in the cultural sector.

Using data from the Office for National Statistics’ (ONS) Labour Force Survey (LFS), we examined what happened to jobs and working hours in the creative economy. We focused on the following occupation segments: museums, galleries and libraries; music, performing and visual arts; film, TV, video, radio and photography; and publishing. We combined these together into a single category of “core creative” occupations. To show the impact of the first lockdown, we compare the first and second quarters of 2020.

Many workers left their creative occupations, either for another occupation outside the core creative group or for non-employment. The number of workers entering the core creative occupations from other parts of the workforce was also reduced (see below).

Leaving and entering core creative professions – sources and destinations

![Core creative occupations > non-employment](image)

![Core creative occupations > other](image)

![Non-employment > core creative occupations](image)

![Other occupations > core creative](image)
The most dramatic decline was observed in music, performing and visual arts occupations where the professional workforce was cut by around a quarter (202,000 to 159,000 between 2020 Q1 and Q2), with no signs of significant recovery by the end of the year.

Average working hours in core creative occupations also fell steeply in 2020 Q2, from 26 to 20 hours a week on average – a drop larger in both relative and absolute terms than that for all other occupations combined (31 to 26 hours a week). The decline is even sharper if compared to the parallel quarter in 2019. There was some recovery by 2020 Q3, to 23 hours a week on average, but this was still lower than in the pre-pandemic period.

Mean hours worked per week – occupations

<table>
<thead>
<tr>
<th>Industry</th>
<th>Occupation</th>
<th>Pre Pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core creative occupations</td>
<td>32</td>
<td>28</td>
</tr>
<tr>
<td>All other occupations</td>
<td>28</td>
<td>20</td>
</tr>
</tbody>
</table>

This dramatic decline in average hours worked was found across museums, galleries and libraries; music, performing and visual arts; and film, TV, video, radio and photography occupations. It was notably less apparent for publishing.

The combined impact of the reduction in workforce size and steep decline in average working hours among the remaining workers can be observed by reviewing total weekly hours worked at the sub-sector level. The depth of the crisis in music, performing and visual arts is clear. We also see recovery of activity in museums, galleries and libraries and film, TV, video, radio and photography.

Of course, the creative economy is made up of both creatives and other workers such as accountants, security staff, baristas and many others – all vital to the creative sector. What about these workers, beyond the community of artists, performers, authors and curators making up “core creative” occupations?

When examining numbers in terms of creative industries rather than occupations, we see the same story of a continuing crisis in the music, performing and visual arts industries.
Key findings from sector interviews

The initial impact of the pandemic on the cultural workforce was profound. The work-from-home restrictions from late March 2020 sent creative freelance work into crisis.

Although the government-backed Self-Employment Income Support Scheme (SEISS) was introduced by late March, its rollout was slow and many self-employed and freelance workers were ineligible because of their portfolio working patterns. Almost all of the freelancers that we spoke to characterised this period as incredibly challenging, and in some cases it negatively affected their mental health and wellbeing.

Within the galleries and museums workforce, there was a general sense of panic and urgency around rapid changes such as the shift to working from home and online provision/presence. An immediate impact was uncertainty about job security (pre-furlough) with redundancies in some institutions. Some employees found themselves searching for things to do, while others continued to work on future exhibitions, for example.

Significant work was undertaken in this period to make spaces “Covid-secure” for visitors ahead of reopening, including the implementation of advanced booking systems. For those institutions that were eligible, another key task was writing applications for the Cultural Recovery Fund (CRF). The visibility of the Black Lives Matter movement in July 2020 also precipitated institutions to look closely at the diversity of their workforces, including that of their boards, during this fallow production/exhibition time.

Because large-scale film and TV production resumed as early as July 2020, the screen sector has been regarded by some as having been less severely impacted during the pandemic than others. However, the picture for freelancers in this sector was not so straightforward, even in a thriving and tightly linked ecosystem like the screen industry in Wales. We learned that different degrees of hardship varied depending on freelancers’ roles (e.g. on-set or post-production) and type of employment (e.g. sole trader or limited company).

For staff working for Welsh public service broadcasters covering the pandemic, the workload increased exponentially. A negative impact on workers’ mental health was reported across the board, whether by freelancers feeling isolated and in financial distress or by overworked broadcast journalists. Some interviewees expressed appreciation for the mental health support put in place by their employers and umbrella organisations.

Left without financial support for an extended period, many freelance theatre professionals were initially particularly severely affected. Not all existing contracts were honoured and some took work in other sectors to tide them over. However, as live work remained off the menu, those who were well-networked or had digital skills sometimes found themselves much in demand. The need for online delivery and the streaming of new or archived work led to some tricky conversations about the resources and skills required, rights to work, and the balance of power between organisations and creative practitioners.

Before the furlough scheme was announced, those in permanent employment also felt confused and anxious. Furlough brought relief, although it was never clear how long it would last.

While some theatre workers could work remotely, others could not – either because their roles did not translate, or because of caring responsibilities. Some larger organisations made redundancies and there were lay-offs among casual front-of-house and hospitality teams. Among those not furloughed, workloads increased, and many reported a keen sense of responsibility to deliver work of value and to support their communities under new and unfamiliar conditions.

Creative arts graduates were also badly affected in Phase 1, losing access to vital practical spaces and small group guidance in their final semester, and missing out on final shows and exhibitions. Fortunately, this did not seem to dampen their enthusiasm for future employment in the cultural sector, and many benefited from the more level playing field created by video calls and webinars that enabled them to develop national and international networks much more easily and rapidly than they might otherwise have done.

As soon as I came off my maternity [leave] in January, we went into lockdown in March. So I didn’t actually get enough time to get back up on my feet. So I’ve essentially had two years of not earning. And [...] that’s been really, really tough.
Impact on organisations

Key findings from sector interviews

Suffice to say that when the pandemic hit in the middle of March 2020, cultural organisations were thrown into crisis mode.

Our interviewees all refer to the lack of clarity, or even communications, from national funders and governments, which meant that they were left to their own devices to make exceptionally rapid and challenging decisions about when to close their venues down and how to support a remote workforce. These decisions had to be made with no clear health and safety guidance and often on instinct. Even where they existed, HR departments were out of their depth and trustees were often drafted in to help navigate furlough and redundancy policies almost overnight.

The National Theatre was shut down for the first time in its history. A former director described how there was “skeletal information and a heightened sense of fear”. The lack of government guidance made it extremely difficult to make decisions and the stress was “phenomenal” – decisions had to be made within hours, including closing the theatre and sending staff, actors and audiences home before that evening’s performance. The short-term impact on the organisation was “seismic”. The pandemic “dismantled the business” and highlighted the vulnerabilities in the business and staffing model. During this first phase of the pandemic, the theatre lost 50% of people who were on the payroll in February 2020 and one in four permanent roles disappeared, to achieve overall cost savings of 30%. For those lucky enough to keep working, there was suddenly a “glut” of work such as financial and audience analysis to reset the business model and inform immediate initiatives such as NT At Home. As another interviewee put it, the goal was “survival in the long term”, but to survive, “we had to think of what we stand for [...] how do we continue to do what we do?”

More broadly, organisations in the theatre sector experienced a period of chaos as all live work came to a sudden end, followed by uncertainty about how long the closures would last. Productions were cancelled and sometimes rescheduled multiple times. Core audiences remained loyal and were surprisingly happy to maintain bookings, accepting vouchers or making donations instead of demanding refunds.

Funders were widely praised for their flexibility and responsiveness. Supportive boards and local and national networks became vital for organisational leaders coping in the absence of precedent. There was growing evidence of a polarisation of experience between organisations with public subsidy or stable project funding and those previously heavily reliant on earned income. Digital output (often free and of varying quality) increased, and while some of this did attract audiences, organisations found it frustrating to have to compete with established leaders in the field to make money from it. Where possible, theatres maintained their community or learning and participation activity, often by delivering sessions online but also through the physical delivery of creative resources. Those involved in major place-based programmes – Creative People and Places, for example – used the time to embed their activities within their local communities.

Festivals in Scotland faced their main source of revenue collapsing with live events being cancelled and uncertainty about the future of live entertainment. This forced them to either shut down or adapt, with many postponing until 2021 in the hope that live events would be able to go ahead in some form. Interviewees described the first three months of the pandemic as an absolute crisis. They highlighted the gap in government provision for festivals and complained that the guidance for the emergency funding in Scotland was not clear from the outset.

One of the immediate impacts of the Covid-19 pandemic on galleries, museums and studios in the North East and North West of England was the sudden closure of buildings in March 2020. With the loss of physical sites of exhibition and engagement, institutions rapidly began to turn to the digital as a space in which activity could still take place. From this shift, just as we saw in the theatre sector, questions arose such as “who is this for?” and “how do we do it?” Provision was varied, from online events to regular social media posts. The move to digital highlighted existing inequalities with increased awareness of “digital poverty”. Non-building-based institutions seemed to switch to digital more easily.

In the screen sector in Wales, production of certain genres (e.g. drama) stopped at the beginning of the pandemic, affecting organisations within the sector differently, depending on the type of company, sub-sector, financial model and reserves. Broadcasters reported a sense of renewal of their civic mission to keep the public informed. News and current affairs continued throughout, “covering the biggest news story since World War Two”, as one of BBC Wales’ interviewees put it. Production practices changed to comply with Covid-safe measures, including interviews on Zoom and shooting outdoors. Digital and remote modes of working were put in place – an easier endeavour for those broadcasters already working in this way before the pandemic. The small, independent production companies in our sample felt the impact of the pandemic the most.

The National Theatre was shut down for the first time in its history. A former director described how there was ‘skeletal information and a heightened sense of fear’.
Beyond likes and retweets

Social media analysis

Using the hashtags #CultureInQuarantine and #MuseumAtHome, we explored how cultural organisations and audiences, freshly locked down at home in early 2020, were finding new ways to engage and interact with each other on Twitter.  

Engagement with tweets is usually measured via numbers of retweets, likes and comments. While we used these metrics as our starting point, our aim was to better understand the quality and depth of interactions on Twitter, rather than just their reach. This analysis provided a richer picture of the successful elements that sparked conversations with and between users. We got a sense of the ways in which digital content and engagements were shaped by their real-world contexts during this period, including tweets that were Covid-inspired or related, and tweets which referenced the arts in relation to wellbeing and care.

Some tweets that garnered high levels of interest and traction included the following elements and used the following methods:

- privileges empathy and intimacy over traditional production values
- connected arts and culture with place in ways that reaffirmed the importance of community, locality and nature
- called for engagement or action, signalling efforts to open up conversations and adopt interactive strategies
- celebrated amateur and professional creative practice, often through hybrid initiatives that bridged digital and physical spaces.

Some tweets that garnered high levels of interest and traction included the following elements and used the following methods:

- video and other content which connected powerfully, playfully and/or emotionally with the themes of the pandemic
- pictures of items from collections and “behind the scenes” snapshots, often used with humour, sparking curiosity
- shared educational content, including tweets which highlighted lessons we can learn from the past in relation to the circumstances of lockdown

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*Analysis was conducted from 19 March to 5 May 2020 from a total sample of 9,000 tweets. Further qualitative analysis was undertaken of 450 tweets from this sample.*
Impact on cultural ecosystems

As elsewhere, the national lockdown on 23 March 2020 brought an immediate halt to public-facing arts and cultural activity in Greater Manchester (GM).

Research on the city-region’s cultural ecosystem identified key attributes which served to mediate, if not fully mitigate, the immediate impacts of the pandemic. These were: the involvement of local authorities, including Greater Manchester Combined Authority (GMCA) in cooperation with its 10 district councils; long-standing political engagement in the contribution of arts and culture to wider place priorities beyond the cultural sector, embedded in local cultural strategies; strength of network ties, sector-led cultural partnerships and governance, including Manchester’s “Cultural Leaders Group”; and an established infrastructure of publicly funded cultural organisations, weighted heavily towards Manchester city centre, the location for 33 of GM’s 42 non-profit organisations (NPOs) and 20 of the 35 GM Portfolio organisations.

Strong local networks were key sources of information and guidance, enabling cultural venues to have the confidence to close early, on 16 March, 10 days ahead of the national lockdown. Local authorities lifted conditions on expected outputs for their funded organisations, freeing up finances to manage the immediate impacts of the pandemic. GMCA advanced six months’ funding to its portfolio organisations on this basis, and drafted a culture recovery plan which rerouted strategic funding towards the immediate impacts of the pandemic, prioritising areas not covered by national cultural recovery plans.

Analysis of the ONS Labour Force Survey suggests that, in the first two quarters of 2020, the pandemic effectively wiped out 100% of the growth in creative occupations in GM since 2017, with the performing arts, music and visual arts sector particularly badly hit. Help to mitigate the sudden loss of income for artists and freelance workers was an immediate priority for the sector. By the end of March, GMCA and the Manchester International Festival had launched parallel programmes of targeted grants and micro-commissions, operating in advance of those from DCMS and arm’s-length cultural bodies. GMCA also invested in United We Stream, a new initiative which hosted live-streamed events from local artists and organisations, generating donations from crowdfunding which were distributed as grants to freelancers. A programme producing Creative Care Kits brought the sector together with community and voluntary organisations to deliver cultural activities suitable for lockdown to neighbourhoods and targeted vulnerable groups.

Access to support within the cultural ecosystem was frequently shaped by perceptions of the strategic value of arts and culture to broader policy agendas, their formalisation within local cultural strategies, and the embeddedness of organisations within local partnerships and networks. Relationships between the combined and local authorities and cultural sector organisations were crucial, with policy officers contributing time and resources to support bids for emergency funds. The Manchester-dominated Cultural Leaders Group coordinated CRF bids, pooling resources for collaborative programming and marketing, and the Salford Culture and Place Partnership reallocated public funds to support the city-wide programming of Covid-safe commissions and cultural activity in parks and open spaces. Place-based networks, such as What Next, Key Cities, Core Cities and European Cities of Music Network linked the local sector to advice and support across and beyond the city-region and the North.
The loosening of restrictions and reopening of society was short-lived. In September 2020, and through the winter of 2020/21, further national and local restrictions were introduced. In England, a 10pm curfew for pubs and restaurants, the “rule of six” (socialising outdoors for up to six people) and a three-tier alert system were introduced, swiftly followed by a third national lockdown on 6 January 2021.

In Northern Ireland, localised restrictions were introduced and a four-week “Circuit Breaker” lockdown forced cultural venues to close on 19 November 2020, with lockdown and social distancing reintroduced on Boxing Day. In Scotland, restrictions on social gatherings were reintroduced and cultural venues remained closed, with local lockdown rules imposed from November 2020 and a national lockdown coming into force on 4 January 2021. The Welsh government took a more cautious approach to the new wave of Covid-19, imposing lockdown restrictions earlier than the other UK nations, on 20 December 2020.

A continued lack of clarity about when the furlough scheme would come to an end and a lack of guidance on how cultural venues might reopen safely contributed to uncertainty over the medium to long-term viability of many cultural organisations. Reopening with reduced capacity but a full staff complement placed a huge financial strain on cultural organisations that were already facing significant financial hardship.

Eventually, in November 2020, the furlough scheme was extended to March 2021, but calls to extend and plug the ongoing gaps in the SEISS went unheeded. A series of high-profile pressure groups and workforce networks emerged across all four nations, in some cases supported by arm’s-length bodies, funders and cultural organisations.

Financial support from CRF Round 1 and other grants and loan schemes for cultural organisations continued, and the rapid distribution of emergency relief funding was widely welcomed by the sector. The opening of CRF Round 2 in January 2021 saw a further £265 million of support distributed across 2,227 grants.

On 3 March 2021 the UK Government presented the 2021 Budget, which confirmed an extension to the SEISS, much to the relief of the cultural sector. DCMS received a 2.9% departmental uplift. A DCMS-led Events Research Programme launched in April 2021, incorporating large-scale cultural events. Its first findings were published in June 2021.

By May 2021, Wales and most of Scotland had moved into Level 2 restrictions, allowing theatres, cinemas, and live venues to reopen. Cultural venues in England, Northern Ireland and Wales would not reopen until July and August 2021.
Impact on audiences

Key findings from Waves 2 and 3 of the Participation Monitor

The Participation Monitor

Wave 2 of the Participation Monitor took place in February and March 2021, when many in the 50+ group were receiving their initial vaccines, and just before the “roadmap” to reopening was outlined.

By Wave 3, in May and June, more of the adult population were vaccinated and venues were starting to reopen.

The period saw a recovery in in-person engagement, alongside which digital engagement initially held up, then fell away:

Engagement in last two months, Waves 2–5

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
<th>Wave 5</th>
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<tbody>
<tr>
<td>In person</td>
<td>Participatory</td>
<td>Online</td>
<td></td>
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<tr>
<td>54%</td>
<td>95%</td>
<td>58%</td>
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<td>26%</td>
<td>31%</td>
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<td>9%</td>
<td>26%</td>
<td>35%</td>
<td>13%</td>
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The overall story can be broken down in relation to digital, in-person events (e.g. outdoor arts), vaccination, attitudes to risk, and the behaviours of key groups such as parents.

New digital offers

Despite the relative importance of the digital offer in this phase of the pandemic, only a minority of the population (43%) accessed it and this was mostly people who had been active online cultural consumers before the pandemic. They were also more likely to have been regular in-person arts attenders.

People who were consuming online culture, however, did so more than pre-pandemic – 60% agreed they were “viewing more... than before” and 58% agreed they had “discovered new forms of arts and culture online”.

Digital engagement skewed towards particular groups of arts-interested people, including younger people (56% of 16–24-year-olds engaged in some form of cultural activity online), those based in London (33%), and those from Black, Asian and mixed backgrounds (68%, 55% and 60%). Families were also more likely to have engaged (54%). Disabled people were more likely to engage with digital content (49% overall and up to 74% of disabled 16–24-year-olds), demonstrating how important an increased digital offer was in improving access.

Digital engagement (all artforms watched) was above average for those from London, from non-white backgrounds, under 35 and with disabilities (difference from overall average) – sample from Wave 1

Vaccination had a surprisingly low impact on confidence

This phase saw the rapid rollout of vaccinations. In February 2021, only 30% of respondents had received any vaccinations (principally the 91% of over 65s who had been vaccinated at that stage); by June it was 78% (95% had had one vaccination, 53% two; at least 60% of all age groups had had at least one jab, except for 16–24s). But although 71% of people strongly agreed (29%) or agreed (48%) that vaccinations were “an important factor for me feeling comfortable in returning to normal”, actual willingness to attend barely moved during this period.

Only 29% of people surveyed in Wave 3 said they would be “happy to attend” if there was something on that they wanted to see.

*Note that these factors are of course correlated since the London population is younger and more diverse than in the UK overall.
Impact on the workforce

Key findings from quantitative analysis

In Phase 2, the trend towards a recovery in average hours worked continued, but the overall level of hours worked in the core creative occupations was still lower than the average level in 2019.

Differences between fields are important to note, however. By Q4 2020, average working hours of publishing occupations actually surpassed pre-pandemic levels. The recovery of activity in film, TV, video, radio and photography, and museums, galleries and libraries also continued, although still did not reach pre-pandemic levels. By comparison, as illustrated below, working hours in music, performing and visual arts showed no real recovery at any point in 2020.

Number of workers and mean hours worked per week – occupations

Families under pressure were keen for distraction

The pandemic produced a range of particular experiences for parents (not least home-schooling, the forming and “bursting” of school “bubbles”, and closures of nurseries and even playgrounds). Unsurprisingly, and compounding the existing known impacts of parenthood on cultural engagement, parents’ behaviour has been distinctive. They have been keener to attend attractions and events (e.g. in Wave 3, 38% of those with dependent children under 16 in their household were “willing to attend”, compared to 26% without) and quicker to return in periods between lockdowns. Those with families were also more likely to say that “the current Covid-19 safety measures are too extreme in relation to the risk” (18%, vs 7% “strongly agree”) and were less likely to agree that vaccines were an important factor in them feeling comfortable returning to normal (66%, vs 72% “agree” or “strongly agree”).

Being culturally engaged made a difference to wellbeing

We asked people about the importance of taking part in arts and culture for their wellbeing. Most who had done so (80%) said that it had a positive impact and a majority said that attending, taking part in creative activities and digital culture all had a positive effect on their mood and on managing anxiety.

This is significant as data from June 2021 clearly showed that the pandemic had had an adverse effect on respondents’ sense of wellbeing, with 36% saying they felt lonely more often during the pandemic, and 38% saying they now felt “less satisfied with their life”.

Despite things opening up at the time, when asked about how they had been feeling over the previous two weeks, 29% of respondents said they rarely or never felt optimistic about the future and 23% said they “often or always” did. By Wave 5 these figures had shifted to 33% and 25% respectively.

Talking about “having energy to spare”, a third of respondents said they never or rarely felt they had any (up to 38% by Wave 5) and a quarter had “none of the time” or “rarely” experienced an interest in new things (with similar figures in Wave 5). Without wanting to assume causation (let alone direction of causation) all of these are associated with being more or less likely to be happy to attend events.

To summarise, the case for the importance of arts and culture in managing stressful times was clear and we built a solid understanding of the relative benefits of different kinds of activities of different groups.

All figures in this section are from June’s Wave 3, unless stated.
The data for Q4 2020, covering the final three months of the year, also indicated what could be longer-term problems for the cultural sector, and scarring of the labour market for cultural workers. The flattening of the recovery in working hours in museums, galleries and libraries, along with no revival in working hours for music, performing and visual arts was accompanied by ongoing uncertainty over the viability of cultural sector organisations and hardship for workers, especially those who did not qualify for furlough. As other sections in this report demonstrate, by the end of 2020 the hope for revenue raising via digital distribution remained unrealised; in England, the CRF was primarily supporting organisations already connected to the state funding system; and as the ongoing campaigning of organisations supporting freelancers shows, significant numbers of cultural workers were not eligible for the UK government’s support package to the cultural sector.

We must of course be cautious regarding longer-term trends. Newer data from ONS regarding the economy overall shows high levels of employment and significant shortages of workers in specific sectors. For music, performing and visual arts occupations, the January 2021 lockdown is likely to have harmed the hoped-for recovery in working activity still further. For museums, galleries and libraries, the impact of large periods of physical closure and its effects on buildings and collections, on top of ongoing concern over the sector’s financial resilience, is likely to be perceptible in 2021 labour force data and beyond, although it is less clearly evident in the 2020 figures due to the availability of furlough and sectoral support schemes.

There is also the question of the distribution of this loss of working activity: who is losing hours and jobs? We examine this in the next section on the impact on the workforce (p.41), when we discuss “Phase 3”.

Key findings from sector interviews

In the screen sector, large-scale film and TV production resumed from July 2020, which meant that some freelancers could return to work. Crews were required to comply with Covid-safe procedures, but we heard examples of unsafe working conditions, such as freelancers not being tested while those on fixed contracts were. Editors reported the benefits of working from home, and employees of some independent production companies (indies) and broadcasters also valued remote and hybrid modes of working. There was also a worry that some of those on furlough might not return to work. While this did not turn out to be the case for most, there were reports of people leaving and changing workplaces that were hard – or decide not to come back at all. While this was the case for many, some continued working whom were also experiencing an extended lockdown that was hard on everyone. Networking, felt to have been so helpful during the early stages of the pandemic, diminished. There were continuing concerns for people’s mental health and wellbeing, with growing talk of burnout. There was also a worry that some of those on long-term furlough (including those in technical or backstage roles) would find the return to work hard – or decide not to come back at all. While this was the case for most, there were reports of people leaving and changing jobs in late spring and early summer, with skills gaps identified in areas such as fundraising and marketing.

For museums and galleries, the issue of funding remained a key narrative with continued work on ongoing applications. Across the interviews, it was reported that the existing skill sets for writing applications were haphazard and piecemeal; some noted that cross-sector networks were either formed or drawn on to support this work. Some local authority institutions remained closed while their staff were redeployed to work for food and care services, or work on the administration of business and hardship grants. The constant need for adaptation coupled with uncertainty (heightened by the numerous local lockdowns and the introduction of the tier system) was draining for staff, with reports of increasing exhaustion and illness. Mental health and wellbeing remained a significant concern.

There were continuing concerns for people's mental health and wellbeing, with growing talk of burnout.”
### Impact on organisations

**Key findings from sector interviews**

For theatre organisations, continuing uncertainty was mitigated by two rounds of Cultural Recovery Funding and the continuation of the furlough scheme. But many commercial producers and those building-based organisations dependent on earned income remained largely “mothballed”. Some (particularly those affected by regional lockdowns) experienced the frustration of a Covid-secure rehearsal period and “get-in” for socially distanced productions in the winter season only to have this followed by closure at short notice, sometimes just hours before opening. Some managers struggled to call their front-of-house teams back to work when lockdowns were temporarily lifted in certain “tiers” of the country because they were working and/or studying full-time elsewhere. The tier system and multiple sets of behavioural regulations introduced during this phase were described by one interviewee as “death by a thousand cuts” for theatres. Widespread producer cancellations, particularly at large scale, pushed reschedules further and further into the future.

However, many leaders praised the efficiency of emergency relief funding, without which their organisations might well have folded altogether. Arts Council England was singled out for particular praise in its rapid distribution of funds – although some interviewees reported an oversaturation of digital content while others noted that digital or hybrid delivery had revolutionised their relationships with schools and education partners. Work that engaged hyperlocal communities also continued in this phase: institutions with collections began to “activate” them, for example, via social media or rethinking how to use them when reopening in place of returning to the “exhibition economy” (as one participant put it). The spring roadmap provided clarity and hope.

Although many film and high-end TV productions resumed in July 2020 thanks to the government’s Film and TV Production Restart Scheme, Covid-safe production proved more costly than it had been previously and there were widespread skills shortages, from managerial to technical roles. Some of the smaller Welsh indies reported not qualifying for the Restart Scheme and finding the cost of insurance prohibitive. However, there was increasing evidence of sector collegiality, new networks and partnerships within and across sectors. For example, many indies did not charge broadcasters for reusing their programmes, and broadcasters like S4C increased their commissions of new programmes during the pandemic to support the production sector in Wales. This was a very welcome initiative, but its impact was not always felt across the board. Needing to prioritise their own staff, indie directors were not able to offer as much work to freelancers as before. For broadcasters, this was an opportunity to test new ways of interacting with audiences, some of which proved successful. The acceleration of the digital shift, including more creative and agile ways of working and creating content, was seen as positive. All broadcast interviewees also highlighted the educational role of news in the pandemic and their role in making some audience members aware of devolution and the powers of the Welsh Government for the first time.

In Scotland, many festivals turned to digital platforms to engage with their audiences although interviewees stressed that these virtual events could never replace the live experience. Some smaller festivals could not engage their audiences in this way due to issues with capacity and resources or simply because their events were not transferable to virtual audiences. Over the winter months of 2020–2021 many festivals considered shifting their engagement to more local or regional audiences, emphasising how they could help their communities both creatively and practically by offering creative care packages, raising money to help food banks through virtual gigs and even developing community-led digital content. Some rural music and performance-based festivals suggested that their online and streamed content had actually boosted their visitor demographic (more families, fewer older people).

_“This uncertainty around when the funding would arrive was causing emotional, logistical and financial stress to both colleagues and the wider cultural sector.”_

_“There’s no better time than now to take the cultural temperature of the nation.”_
Impact on a cultural ecosystem

A case study of Greater Manchester

Unlike other parts of England, Greater Manchester (GM) was put under additional local lockdown restrictions for most of the second half of 2020, which impacted the cultural and hospitality sectors in particular. Interviewees noted the emotional, financial and organisational impacts of a series of “false starts” towards the end of 2020 as Tier 3 restrictions were imposed and repeatedly extended. This led to repeated rewriting of contingency plans and risk assessments, difficulties and delays with supply chains, and expensive investment in new safety measures and equipment which remained unused, at a time when staff team numbers were still reduced as a result of furlough.

The first round of CRF awards were announced in November, followed by the Cultural Capital Kickstart in December, and CRF Round 2 awards in April 2021. Funds to GM made up 60% of all funds to the North-West region, distributed across 175 organisations; almost 75% of these funds went to organisations based in Manchester. Over 25% comprised capital for building projects, including £21 million to Manchester city centre’s The Factory, the new home for the Manchester International Festival. Some organisations accessed public funds for the first time, with 75% of funds to the city centre going to non-NPOs, such as comedy clubs and music venues, recognising the common crisis within the night-time economy. More broadly within the city-region, recovery funding followed where arts funding had gone before, with 29 of 41 NPOs and 25 of 35 GM Portfolio organisations receiving awards from the first two rounds.

CRF funds were universally welcomed, offering financial security and space to rethink and strategise, with some using the “pause” of the pandemic to address long-term organisational priorities. As elsewhere, support from arm’s-length bodies such as Arts Council England was acknowledged and appreciated, particularly the proactive approach of individual officers and flexibility over reporting on grant conditions. However, central government messaging caused concern: a frequent observation was that national government guidance did not demonstrate understanding of sector business models, and failed to take into account the time and cost required to reopen venues. Guidance lacked consistency and clarity, and continual revisions created a significant additional administrative burden.

Regular meetings of the Cultural Leaders Group, the GM Culture Portfolio, and the independently formed GM Artist Network helped distribute some of this burden across multiple organisations, with knowledge sharing and peer support identified as two key benefits. Local authorities conducted research and consultation to gauge experience and inform decision making, and sought new ways to make the case for culture’s role in local recovery, through placemaking and reanimating high streets, for example, as part of the emergent “Levelling Up” agenda. Collaborations, formed early in the pandemic with private sector partners who have stakes in arts and creativity, solidified, for example MediaCityUK in Salford, whose Box on the Docks commissions had reinvigorated footfall to the Salford Quays.

Such initiatives tended to benefit well-networked, building-based organisations more than voluntary groups, “grassroots” organisations and individual creative practitioners. The limited evidence of “trickle down” through large organisations was concerning, particularly in the continued absence of national policies targeting creative freelancers. An emphasis on reinvention and diversification in both business and equality, diversity and inclusion terms, highlighted by the pandemic’s exacerbation of inequalities, placed further strain on organisations and their boards, and on arts managers who, in many cases, saw no reduction to workload through furlough, once again indicating a looming mental health crisis within the local cultural sector.
A broadly successful rollout of the vaccination programme and a high uptake of “booster jabs” reduced the risk of serious illness and hospitalisation. The Scottish Government introduced a vaccination certification scheme, enforceable from October 2021. Covid status certificates were required for entry into high-risk venues including theatres, cinemas and music venues. In Wales, an “NHS Covid Pass” was required to attend performances and events in cinemas, theatres and concert halls from 15 November 2021.

The settlement for DCMS in the Spending Review in October 2021 included funding to boost culture in local communities and on the high street, and temporary extensions of tax reliefs for theatres, orchestras, museums and galleries. It also confirmed funding to support the creative industries across the UK, an allocation to the Live Events Reinsurance Scheme, and the Film & TV Production Restart Scheme was extended to enable UK events and productions to plan with certainty.

CRF Round 3 opened in August 2021 and saw nearly £100 million in 873 individual grants directed towards cultural organisations that were in receipt of CRF funding in Rounds 1 and 2 (“Continuity Funding”) and additional organisations that were struggling to recover.

In November 2021, just as this study concluded, the first cases of the Omicron variant were detected in the UK, suggesting that many of the policy challenges described in this report will continue to have relevance for some time to come.
Key findings from Waves 4 and 5 of the Participation Monitor

Cultural participation
Wave 4 of the survey took place in late September and early October 2021 – once all social distancing measures had been lifted and venues for the most part reopened. Wave 5 took place in late October and early November 2021, when many people were receiving boosters (and prior to the new concerns about the Omicron variant).

People’s “willingness to attend” scarcely changed
The proportion who were “happy to attend” hardly shifted between Waves 2 to 4, which was especially notable given how much had changed in the external environment (from the rollout of vaccines to the opening up of venues). Finally, however, it increased in Wave 5, creeping up to a full third of respondents being “happy to attend” (but still only 30% who “would consider... with reservations” and 37% in the three other categories who weren’t comfortable or interested in attending). These figures only increased a couple of percentage points among pre-pandemic attendees. This suggests that up to a third of regular audiences were still put off attending as of November 2021.

Willingness to attend was steady from Feb to Oct, then started to increase

Safety measures continued to be important
Safety concerns across the population remained high even into the last wave of the survey: 51% agreed that they were worried about falling ill and 62% worried about others falling ill. Similarly, desire for safety measures remained high, especially for indoor experiences. People were still worried about the safety of outdoor experiences but not as much they were for indoor experiences.

Despite this concern and strong desire for safety measures, most who had been back to events were satisfied with the measures in place (83%). Across various art forms, most wanted about the same level of measures in place, though a minority wanted more. Only a small number of people (around 15% at different times) felt that Covid safety and distancing had spoiled their experience and even fewer felt that it would put them off next time. Overall, the safety accommodations that venues made were largely in line with public opinion.

Live-digital hybrids emerge
By the summer of autumn 2021, while some organisations were returning to in-person-only offers, others were talking about developing new, live-digital programme hybrids or blended experiences. In this period, perhaps accordingly, the number of people saying they were engaging with digital culture dropped slightly. Despite this trend, it seems that demand for online content, digitally enhanced experiences or blended models remained high as of November 2021. In fact, even typically less-engaged audiences expressed an interest in interactive digital experiences after the pandemic. The majority of people who had been engaging with digital thought they would continue to do so in future alongside live attendance. A significant minority (15%) said they thought digital events might displace some or even all of their live activities.

Donations and support on the increase
Early concerns that donations might dry up with the disappearance of the offer turned out to be unfounded. In fact, support for the arts as a “good cause” has only increased during the pandemic. In Wave 5, 86% “agreed” that “arts and cultural organisations are ‘good causes’ that deserve support from individual members of the public” and 84% “… from government funding”. Interestingly, these views were not biased towards any political affiliation.

Similarly, 57% “agreed” that “the pandemic has made me feel that arts and cultural organisations are more worthy of support than I did before”, and 50% were also more willing to support than before. There was also widespread concern (75%) about the negative impact of the pandemic on the cultural sector

Work from home set to change cultural habits
8% of people who worked from home during the pandemic said they would continue to do so some if not all of the time when there is no longer a threat. People in this category tended to be younger and more affluent than average; they were also more interested in arts and culture. A high proportion of disabled workers were also in this group. They anticipated spending more leisure time locally – in fact a majority of all respondents expected to do more locally in future. Anticipated spending more leisure time locally – in fact a majority of all respondents expected to do more locally in future. Add in the impact of the so-called “Great Resignation” and the potential for profound shifts in the long-established map of engagement is clear.
**Lasting change**

Although public feeling does of course reflect changing circumstances, it has been revealing how static attitudes – such as willingness to attend and levels of anxiety or impatience – have remained. A majority of respondents in Wave 5 expected the pandemic to “still have an impact on our lives and activities” well into the future: 87% thought it “very” or “quite likely” in six months, 78% in a year and 57% in two years. The febrile crowds of people in big cities eager to get back out – perhaps more often than they had been used to previously – may have masked the loss of large parts of older audiences. In this sense, it seems as though the uncertainties about demand are far from over.

Other changes in public behaviours and attitudes might have yet more lasting impact. Younger people, keener to return, are bringing with them a shift in aggregate tastes. As of November 2021, people say they expect to attend indoor events less and to do more outdoors. Staying local is likely to bring about change, though exactly how still seems difficult to predict. In the minds of audiences at least, digital is here to stay and it would be missing a trick to ignore the increased appetite and interests from the next generation of audiences. There are some people who will likely never return – and some who will connect with the new cultural landscape in ways that they otherwise would not have. We cannot overlook the fact that longstanding inequality of cultural access and opportunity has just got worse.

Most of these issues can then be construed as either opportunity or threat and it seems that organisations will also need to adopt new behaviours to match. The more agile and resilient an organisation is, the more likely it will be to ride out all this unpredictable change to its advantage.

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**Impact on the workforce**

**Key findings from quantitative analysis**

In this Phase 3 section we consider the impact of the pandemic on different demographic groups within the cultural workforce. We focus on demographics to identify likely longer-term impacts, in turn reflecting long-standing inequalities in the UK’s cultural occupations and industries. It was clear well before the pandemic that the cultural workforce had major issues associated with who gets in and who gets on in arts occupations – inequalities we might also expect to shape the impact of the pandemic.

Our initial analysis used the longitudinal version of the LFS to explore the comparative likelihood of leaving creative occupations. We found that women, people who experience racism, disabled individuals and those without higher education qualifications appeared more likely to leave the sector during 2020. The relatively small sample sizes do not permit more confident conclusions, but we can be more confident about differences between age groups: younger creative workers (the under-30s) were significantly more likely to leave creative occupations than their older counterparts.

What about those creative workers who stayed in creative occupations? We can look at hours worked to see the differential impacts of the pandemic on different demographic groups and determine that younger workers were not only more likely to leave, but also had larger reductions in working hours compared with their older counterparts.

For women in creative occupations, the pandemic halted recent trends towards greater female representation. Coupled with what we already knew about gender inequalities in the cultural sector, specific occupations saw a “levelling down” in hours worked. Although men and women alike suffered huge losses in hours across all core cultural occupations besides publishing, women’s relative losses were worse, and men benefited more from the subsequent recovery in hours worked.

For ethnically diverse creative workers, the picture is obscured by small sample sizes in the LFS. If we consider industries rather than cultural occupations to ensure sufficient sample sizes, we can see clear differences in change in hours worked by ethnicity. Notably, in music, performing and visual arts, ethnically diverse workers saw larger reductions in hours during the pandemic than their white colleagues.

Two other demographics are important. As we’ve seen in the sections on audiences, disabled audiences experienced mixed impacts of the pandemic, with new engagement opportunities via digital forms of distribution, but new barriers too due to safety concerns as venues reopened. For disabled creative workers, the pandemic seemed to have similar impacts to the rest of the creative workforce. Although there are far fewer freelance disabled workers in music, performing and visual arts occupations, they saw similar losses of economic activity as their non-disabled colleagues.

Finally, in terms of education, the data shows that more highly educated core creative workers are recovering their hours of work at a faster pace than those with fewer formal qualifications. In terms of total hours worked in the museums, galleries, libraries and publishing occupations, by Q4 we can see evidence of recovery in economic activity among the degree-level educated which we do not observe for those without degrees. Should such trends continue through the pandemic recovery period, the lack of diversity in the cultural economy evident pre-pandemic will remain a significant structural problem in the longer term.

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Interviewees expressed a strong sense that “burnout” was hitting hard through the summer and autumn of 2021. This was particularly apparent in Northern Ireland, where restrictions were lifted later into the summer than in the other UK nations. The dual pressures of the sector beginning to open up and the social, economic and emotional effects on labour from the lockdowns had taken their toll on the cultural workforce. Interviewees expressed how this was affecting their leadership in terms of not being able to take leave and recharge. Interviewees in Northern Ireland also confirmed that there was still a systemic problem with digital skills during this phase. However, the majority felt that the main issue was now a major workforce shortage in creative producing and middle-management roles. Interviewees suggested that the cause of this shortage was complex and probably a combination of historical lack in investment, the effects of the pandemic on the sector and workforce issues caused by Brexit.

For many of those working in theatre in England, the shared experience of putting on live work again and of physical co-presence with audiences was nourishing; and interviewees in this sector expressed a sense of positivity and hope. However, as the Director of one small theatre company noted: “People are working flat out and yet they are carrying so much”. In organisations, many staff had not taken any holidays during the pandemic. While some senior leaders had put in place packages to support and encourage their workforce, such as flexible working arrangements or increased pension contributions, worries about the mental health impact of continuing to live with volatility and risk remained. And, with the prospect of financial restraints in place across the sector and furlough having led to pay suppression for many over the past year, interviewees suggested that staff with more easily transferable skills might well be questioning their career prospects.

In the Welsh screen sector interviewees spoke of a bright future, especially for film and high-end TV drama. Freelancers seemed to be in high demand, with higher pay rates, although certain freelancers and indies may have lost momentum because of fewer commissions and some even feared going out of business. There was also a worry that freelancers would be overworked and have to accept more jobs to make up for the income lost during closure. Some spoke about Universal Basic Income as a way forward. Lockdown brought some positives such as having easier access to commissioners, reaching international clients and having opportunities to upskill. On the other hand, interviewees also mentioned colleagues who were forced to take up other jobs or leave the industry altogether.

Despite praising the efforts of the Welsh Government, local authorities and other public bodies, interviewees felt that freelancers in the screen sector lacked adequate support and advocated for change. This is being partially captured by The Freelancers Pledge that will require public bodies in Wales to recognise freelancers’ contributions and to pay them fairly for their work, within the framework of the Wellbeing of Future Generations Act.

After reopening, our interviews presented a varied picture of the workforce in galleries and museums. Some institutions reported redundancies and even experienced deaths within the staff team, while others began to recruit new staff. Work on diversifying the workforce continued but remained sporadic and contested. Some interviewees reported that staff roles had changed, particularly within institutions that were restructuring (some preceding, but impacted by, the pandemic). Contracted hospitality, invigilation and front-of-house roles were seen as particularly precarious, with some interviewees questioning the future of these. After reopening, some institutions also found themselves badly affected by the “pingdemic”.

The majority of those interviewed noted the emotional labour involved in dealing with the effects of the pandemic, and the impact therefore on the wellbeing and mental health of staff, including burnout. One participant described their experience as like having PTSD, noting that everything “feels a bit fuzzy”. Blended working practices remained as of November 2021 and as a result, some organisations had repurposed office space for community purposes, amongst other things. Interviewees who had joined, formed or regularly met with networks during the closures reported continued engagement with these. A small number of organisations were aware of an emergent divide between workers who had been furloughed or working from home and those who had not, creating an “us and them” mentality.

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8 Large numbers of people being told to self-isolate through the NHS Track and Trace app, leading to staff shortages and business closure.
When most theatres reopened in the late summer and autumn of 2021, future programmes looked full. But in reality, much of this was rescheduled work, with few small-scale, touring or studio productions. Confirming our population surveys, interviewees reported audiences as being “terrifyingly” slow to book, although this differed according to genre, location and audience segmentation, with commercial and London venues holding up better than those in the subsidised sector and other regions. Some interviewees wondered whether certain audience groups, particularly older ones, might never return. The absence of clear and consistent rules around social distancing and wearing of masks in England, as well as the summer “pingdemic”, were viewed as unhelpful.

In addition, inconsistent approaches were being encouraged by commercial producers keen to fill houses, in contrast to those putting on subsidised work where they could afford to remain socially distanced. Digital work, described by one interviewee as an asset or audience development tool and by others as a way to de-risk future productions, was increasingly de-prioritised by the sector in favour of live performance. Many theatres were now back to full programmes with depleted, exhausted and overworked teams; they were struggling to recruit and to implement their pandemic-inspired business models based on seemingly utopian principles of hyperlocal engagement and “less is more”. As one senior leader commented: “The ambitions are undimmed but the resources are much less.”

Leaders in larger organisations were keen to emphasise a desire for financial prudence and caution. However, several theatres we spoke with were now reaping the benefits of their revisioning and deep strategic thinking. Many were better able to articulate their social missions, while others had diversified their boards and enrolled their staff in diversity and/or anti-racism training. Those in the subsidised sector were also considering how the cementing of relationships with local and community partners and the increased visibility of their learning and participation activity during the pandemic might translate into Arts Council England’s Let’s Create strategy and the government’s “Leveling Up” agenda to support future funding applications.

In Northern Ireland interviewees reflected on how their experiences of developing their networks and the resulting application of collaborative leadership had developed both their organisations and the wider cultural sector. There was a sense of caution, however, that these new relationships could diminish over time and that working methods could easily “snap back” to more insular and siloed ways of working if they were not actively maintained.

For northern English galleries, museums and studios, the process of reopening was uneven; not all institutions were able to open from 17 May 2021, with some reporting not “getting going” until July or August. Responses to the 17 July lifting of national restrictions was cautious, with interviewees noting a lack of confidence in completely removing these internally. Some institutions continued to restrict numbers within their galleries or operate with reduced opening hours and most encouraged the wearing of masks by staff and visitors (with some noting that this was not widely observed). As of November 2021, footfall remained reduced in most institutions and was significantly below pre-pandemic visitor numbers. However, there were reports of increased local audiences. Most of the institutions interviewed were still rethinking and reworking their business models: it was not just a return to business-as-usual.

Continued community-focused work remains a priority for most institutions and although for some, existing community work was accelerated by the pandemic, for others it was initiated by it. Regarding future plans, institutions are increasingly focusing on the local need. In contrast to the performing arts, it is clear that hybrid delivery of content is here to stay in the museums and galleries sector.

For festivals in Scotland the lifting of restrictions in July and August 2021 meant that some summer season festivals could actually go ahead. However, for several festivals the announcement came too late, leading to further cancellations which would have a further knock-on effect for the 2022 season. Financially, many of the festivals we talked to were stable, owing to government assistance schemes and the eventual arrival of regional and national funding streams (which was slower than in England). However, interviewees stressed that the real test would come over the next two to five years, with the visitor economy key to this recovery. Accordingly, the festivals we spoke to have started to implement longer-term sustainability plans to develop regional tourism alongside hybrid digital and live content programmed throughout the year.

Despite the narrative of survival and success of film and high-end TV drama production in Wales, interviewees felt that the Welsh screen sector should aim for sustainability, long-term development and diversity rather than becoming a “servicing industry” for big (co-)productions. These were often described as using Welsh locations and crews but not investing in the
For the performing arts, music and visual arts, increases in working hours were clearly stratified by ethnicity, class and gender, reflecting a national picture of deepening structural inequalities within the sector.
The Edinburgh Fringe is the world’s largest arts festival and has become a blueprint for hundreds of international fringes since its conception in 1947.

In 2019 the festival clocked up over 3,500 shows across the city with 3,012,490 tickets issued. The Fringe is not programmed by one organisation but exists as a collective of hundreds of venues, artists, companies, the Fringe Society and cultural organisations, not to mention all of the interconnecting sectors such as tourism, hospitality and marketing/PR management subsectors. This represents a complex and interdependent set of stakeholders.

In March 2020 it became increasingly likely that the organisers would have to pull the festival because of the pandemic and as other festivals began to cancel, the Edinburgh Fringe soon followed suit. Revenue streams dried up almost overnight and the entire Fringe ecology was sent into crisis mode with venues, artists and the Fringe Society frantically lobbying the Scottish Government and other funders for support. Alongside this came a complete rethink about how to plan, organise and deliver some form of content to mark the summer of 2020.

Although there was tension and friction between the many stakeholders involved in the festival, the crisis brought often disparate parts of the Fringe “family” closer together to support one another and share knowledge/resources. The outcome of these negotiations was a form of digital Fringe with venues and producers commissioning digital and live-streamed events for virtual audiences in line with national restrictions as well as a Fringe-wide fundraising campaign to support artists.

In the summer of 2021, the Edinburgh Fringe took place in a hybrid form of live and online performance. The indoor venues had reduced visitor numbers with more emphasis on street and outdoor acts. The festival itself comprised over 900 shows and sold over 350,000 tickets: around 40% of shows took place online and over 14,500 digital tickets were sold. This was a fraction of the size of the festival in 2019 but what became apparent in feedback from residents, artists and Edinburgh City Council is that the Fringe’s annual impact on the city, in terms of influx in the population, congestion and disruption was greatly reduced. This smaller Fringe was more sustainable for the city with the traditional 15-minute dash between venues scrapped and outdoor crowds reduced. Visitor estimates bring this difference into focus with an estimated 4,000–8,000 visitors per day across the festival’s two street event areas compared with around 50,000–75,000 in 2019.

The impact of this shift was felt economically with the fewer visitors and predominantly local/national audiences spending less. Indeed, without national and local government intervention, the Fringe model employed in 2021 would not have been financially viable. As a longer-term strategy the Fringe Society is changing its approach and exploring possible revenue generation by launching a fundraising campaign, and has appointed Phoebe Waller-Bridge as its President to help kickstart this new approach.
The Lowry, Salford Quays, Greater Manchester

Losing 95% of its income, moving staff to working from home and closing its doors to audiences overnight was a scenario that no one at this large Salford-based theatre and gallery complex could have planned for.

Over the past decade, the managing charity had made successful strides towards complete financial sustainability. In March 2020, like many other building-based organisations, The Lowry was in the perverse position that the less it did, the more sustainable it would remain.

Emergency Response Funding from Arts Council England and the furlough scheme provided vital support. In autumn 2020, Culture Recovery Funding allowed The Lowry to sustain its artistic programme into 2021. Furlough continued for many, but staff were asked to take pay cuts, hours were reduced and some opted for voluntary redundancy. Even these actions could not compensate fully for the cost of running a large, empty building.

The organisation began exploring options early on for alternative uses of the space, finally settling on a relationship with the Ministry of Justice that saw the smaller Quays Theatre used as a “Nightingale Court” between September 2020 and August 2021. Relieved to find a solution that would help it survive, The Lowry did not foresee the backlash – “when people threaten to burn your building down!” – that it, and fellow Nightingale Court venue, Birmingham Rep, would experience, with local communities and some creative partners accusing them of breaking trust. At the time it also felt as if the organisation was moving “against the zeitgeist”, with the sector beginning to reopen and the government talking positively about Christmas. With hindsight, its caution may have been justified.

Supporting vulnerable young people is core to The Lowry’s mission; learning and participation work has continued throughout. Staff had to develop new digital skills at speed. As it became evident how badly the pandemic was affecting young people’s mental health, activity moved from online to face-to-face (where allowed), but in community venues. The team worked closely with the local authority and joined with other Greater Manchester providers in developing creative packs as part of the Free School Meal provision. Relationships with schools continued, including through digital artists-in-residence placements.

A new programme of in-person creative work delivered outdoors was well-received. As a result, the organisation may be able to fast-track plans to continue similar programming, extending its presence beyond its walls and immediate “Media City” locale. Effects of this could be longer lasting than any moves to digital during the pandemic, most of which are proving difficult to exploit financially.

The Lowry is emerging from the pandemic bruised. The crisis has been hard for staff, whether furloughed, or continuing with heavier workloads, fewer resources and the pressures of working from home. Some key team members have been lost, skills gaps have arisen in areas such as development, fundraising and marketing, and the organisation will need to exercise pay restraint for several years. Audiences have been slow to return and producer confidence feels unpredictable. Since smaller and more challenging work is heavily subsidised by more commercial shows, there are implications for future programming.

Financially, it faces an extended journey to full recovery, despite securing a £7.3 million Culture Recovery Fund Repayable Finance loan.

However, The Lowry is perhaps more able now to articulate clearly its ethical and artistic voice. It knows the building can be “an adaptable tool in our armoury”. There is also a feeling that activities during the pandemic have created a distinctive platform for future work, reinforcing the organisation’s value to partners such as the local authority, to the local cultural ecology including freelance creatives, to philanthropic donors and funders, and to Salford residents and audiences.
When BALTIC reopened its doors after the first lockdown in August 2020, it had endured five months of the closure of its substantial building incorporating 2,600m² of art space.

For an organisation reliant on 40% earned income, the loss of revenue from its café, restaurant and shop, not to mention spaces for corporate hire, public donations and so on posed a substantial threat. Furloughing nearly 80% of staff reduced outgoings, but BALTIC was not eligible to apply to the Arts Council England’s Cultural Recovery Fund, because during the time they were closed, most staff had been furloughed and the organisation had claimed rate relief. Furlough, however, also proved a difficult process for BALTIC’s staff. Some of those furloughed felt that their work was judged as not “essential”, while those that had continued to work had to cover more ground and complexity, with most working longer hours.

This moment of threat also served as a point of reflection and adaptation, allowing BALTIC to consider its core values. Since the appointment of Director Sarah Munro in 2015, the organisation has been more consciously committed to exploring its responsibilities to communities across Gateshead, Newcastle and beyond. The pandemic more fully entrenched this ethos amongst BALTIC’s staff. As one staff member communicated: “We are of more use now”. This reflection brought about a number of key changes in the gallery’s practice:

**Community engagement.** Existing community partnerships have been strengthened, as these partners have also prioritised civic responsibility and “now understand what [BALTIC] have been doing”. Projects built on these partnerships have also grown. A creative food provision programme, operated in partnership with community groups including local food banks, was delivering to 112 families in Gateshead, up from 25 pre-pandemic.

**Space.** After BALTIC’s catering partner pulled out from running the ground floor café, it was repurposed as a community space known as the “Front Room” (see image on right). Under normal circumstances, this move would have been “too big a leap to get past the board, but when nothing’s at stake, these things can happen!”

**Organisation.** All staff and board members undertook poverty-proofing, anti-racism, gender equity and disability-ready training. The curatorial and learning teams have also been more closely integrated, and the vacant Assistant Director and Finance Director roles have been replaced by a new Director of Enterprise and Public Value. The brief for this new role has been to consolidate thinking around income generation and the organisation’s values and principles, in particular its commitment to building a “different, less transactional relationship with the local community”.

One immediate manifestation of this has been to persuade former corporate sponsors and partners, who were no longer keen to support BALTIC “just for the sake of transactional benefits”, to involve themselves in “corporate social responsibility” projects. The 2021 Murals in Schools project commissioned five artists to produce murals in Gateshead secondary schools. Each was supported by a BALTIC corporate partner.
Theatre Absolute, Coventry

A project-funded theatre company with a small core team, Theatre Absolute creates cross-disciplinary performance with a focus on narratives that are radical or disruptive. It is embedded in its local community, with a shopfront theatre space in Coventry that opened in 2009. Envisaged as an 18-month project, this space has now lasted 12 years.

In March 2020, just three days before opening a piece forming part of its current Humanistan project, the pandemic forced the theatre to close. This was hard creatively and emotionally: “It was like a bubble burst”. While backing from the project’s funders was never in danger, all income from the bar and hires for the year were lost, ticket holders had to be contacted and staff, freelance artists and those involved in planned commissions needed support.

Since that moment the team has seldom stopped producing and adapting: “We’re storytellers, at the end of the day, so we created a raft of work both so that we could keep commissioning freelancers [...] but also be with our communities.” The effort this pivot required was not negligible for a small organisation: it involved multiple funding applications, strategic development, and finding new ways to work with partners such as the Coventry City of Culture Trust.

During extended lockdowns, the shopfront space remained an asset, despite being closed to the public. Its large street-facing windows were turned into a changing exhibition space, engaging passers-by with film, photography, poetry and textiles. Local artists were offered the keys and solo access, along with a small bursary.

Local and nationally recognised writers delivered online workshops for Coventry-based writers, culminating in a series of micro-commissions and an online sharing event. Theatre Absolute made and posted out 300 Writing Boxes containing stimuli and prompts to support creativity and wellbeing at home. Emergency Response Funding from Arts Council England meant that they were also able to offer mentoring, and a 1:1 online script dramaturg service: “We could have run that four times over!”

The company has never viewed its work within the community and the shopfront space as separate. The space wouldn’t exist without the communities who make and come in to see its work. So, while the past 18 months saw Theatre Absolute renegotiating its relationships with audiences online and elsewhere, it never lost them – as demonstrated by their appetite to return since the space reopened in 2021. Indeed some relationships may have been deepened through the new forms of contact used during the pandemic: “There are lots of people who won’t engage in the physical space, for lots of reasons.”

The pandemic experience has written itself into the company’s future plans by further highlighting the inaccessibility of many cultural spaces and places to the team. These plans involve short-term residencies in other public spaces around Coventry alongside some form of digital and online delivery. Alongside this comes a desire to act and make work with greater care and compassion for themselves as theatre producers, and for others.
The British Library

Like most institutions, the British Library pivoted to digital during the first UK lockdown.

The first graph shows the significance of the decline in onsite footfall, dropping precipitously following the first lockdown in March 2020 to less than 1% of the previous week, and barely reaching 10% of an average week’s footfall even as restrictions were relaxed in July 2020.

Take-up for the Library’s digital provision was good, with increased audiences and expanded geographical reach. For example, where previously an auditorium could seat 255, the David Olusoga in Conversation: Black History Matters event in October 2020 reached a live online audience of 2,124, with a further 6,000 views on YouTube as of December 2021. Although many cultural organisations struggled to reach national and international audiences through the digital during the pandemic, the Library’s “findability” as a major national organisation seems to have helped buck this trend. The Library also collaborated more with online event partners to maximise their audiences.

The Library continued to produce both digital and “analogue” programming through engagement with smaller libraries and cultural centres. The value of the Library’s Living Knowledge Network, a pre-pandemic initiative, was significant in decentralising the cultural programme during the pandemic. Distributing cultural resources via local libraries and community organisations allowed for the Library to reach a national audience and also encouraged this audience to engage with local cultural resources that felt the effects of the pandemic more substantially.

One interviewee mentioned the value of being able to connect previously disparate groups across the UK, which wouldn’t have been possible for practical reasons prior to the pandemic. For example, a project on aphasia, #SEEINGSOUND, linked the Library with a Liverpool-based neurological charity. However, those interviewed still stressed the importance of their building as a social space, a service they recognise is not achievable online.

While reaching a broader audience online, the Library simultaneously addressed the needs of their “hyperlocal” communities in Somers Town, adjacent to the St Pancras site, and in Holbeck and Beeston, at the proposed Library site in Leeds. According to The English Indices of Deprivation 2019, these communities are listed amongst the most deprived. In acknowledging the presence of a “digital divide”, the Library’s projects included distributing physical learning packs and cultural resources via local community centres and food banks. The closure of local schools similarly forced innovation in the Library’s learning department as they represent a significant portion of the Library’s cultural engagement programme. This also revealed new challenges including safeguarding in the online environment. The second graph shows that, once exhibition sales were reopened in July 2021, the fraction of ticket buyers from London was significantly larger than before the pandemic. This suggests that the audience for onsite activity for the Library became more concentrated among its neighbours.

* This data is predominantly based on online sales data and excludes a significant proportion of walk-up sales.
The screen sector in Wales is a tightly linked ecosystem of commissioning, production and support.

The majority of small independent production companies (indies) and freelancers interviewed for this study work on commissions by Wales-based TV channels: S4C, BBC Cymru and ITV Wales. We present some insights into the impact of the pandemic on S4C.

S4C (Sianel Pedwar Cymru; in English, Channel Four Wales) is a Welsh-language free-to-air TV channel. A broadcaster-publisher, it commissions most of its programmes from indies from across Wales, and some from BBC Cymru Wales.

The Covid-19 pandemic has had an impact on the organisation’s working practices, but its relative financial security during the pandemic (S4C is mainly funded via the licence fee) placed the organisation in a position to support both its workforce and the sector. The pandemic also reinforced S4C’s mission as a public service broadcaster to inform, educate and entertain.

S4C employs around 100 people, all of whom remained in post throughout. The majority worked from home while a small cohort of broadcast-critical staff worked onsite under Covid-19 safety guidelines. The preparations for remote working had started before the first national lockdown in March 2020 and the transition to working from home happened fairly smoothly. It proved successful enough that the organisation is planning to keep a hybrid working model.

Providing up-to-date, accurate and unbiased information about public health developments was a priority throughout the pandemic. This often took place in new formats (e.g. interviews on Zoom or shooting outside). Some programmes proved so popular that they are still being commissioned.

To support staff mental health and wellbeing, interviewees mentioned the measures set by the broadcaster including online sessions as well as the use of sector resources by the Film and TV Charity.

S4C commissioned £8.7 million worth of programmes throughout the lockdowns to support Welsh indies. Still, freelancers’ workloads were negatively impacted as there were fewer jobs overall.

S4C commissioners made themselves more available to producers online – viewed favourably by the freelancers we interviewed. In partnership with TAC (Teledwyr Annibynnol Cymru), the member organisation of the independent TV production sector in Wales, S4C offered tailored training free of charge for freelancers. Still, one of the S4C interviewees worried that training was not enough: “I’m very, very worried about the fact that we can’t develop the talent we have within the structure of the companies that we have”.

The interviewees agreed that the future of the Welsh media industry will depend on striking a balance between attracting external big-budget productions and creating a sustainable Welsh media sector.

The interviewees described their priorities in audience engagement as providing information on the dynamically changing situation, followed by “light relief". S4C reported evidence of a raised awareness among people in Wales about devolution and the specific powers of the Welsh Government. According to interviewees, live streaming to social media channels proved a success with younger audiences.

Supporting community wellbeing became another priority for S4C. Under the tagline “Yma i Chi” (“here for you”), programmes bringing people together on-air were a “lifeline” for those isolated at home, especially older audiences who had lost their regular community events.

Interviewees agreed that the pandemic both affirmed the crucial role that the public service broadcaster plays in the Welsh screen sector as well as in Welsh society, and created an appetite for Wales-centred and Welsh-language content which they hoped to continue to satisfy in the future.
In April 2020, the Greater Manchester Combined Authority (GMCA) launched United We Stream GM, a digital cultural and fundraising initiative that streamed live performances of DJs, spoken word artists, classical concerts and theatre throughout the national, regional and local lockdowns of 2020–2021.

United We Stream GM hosted 48 live streams over nine months. These received a combined total of 20 million views and raised £853,000 for creative, cultural and night-time businesses as well as charities (StreamGM Sponsorship Release). This was made possible through the tireless work and the generosity of cultural practitioners, record labels and venue owners, often offering services at low or no cost. This, combined with the positioning of United We Stream GM as a fundraising initiative to engage with audiences during a period marked by an immense outpouring of solidarity and charity, enabled the platform to raise over five times as much funding as it cost to develop it.

The GMCA Culture team are now working to transform this ad hoc fundraising initiative into a long-term, sustainable programme of digital culture with a clear place-based identity, creating the community interest company StreamGM. StreamGM’s core aims are: to support and promote Greater Manchester talent; to connect global audiences with the best of Greater Manchester; to develop digital horizons; to lead and participate in global conversations; and be an ethical and sustainable business. Further testing of the model has begun, and StreamGM’s first show, the FLOW talent showcase, took place on 22 April 2021. Since FLOW, StreamGM has produced and hosted five events, including The Untold Orchestra Presents Four Women and Homoelectric at the Manchester International Festival; the UN Convention 2021; a 12-hour set from DJ Graeme Park; and Greater Manchester (Digital) Pride. As a local government initiative in partnership with senior figures in the city-region’s creative and night-time economy, the outcome of this new venture, which takes a strong place-brand as the basis for connecting with global audiences digitally, will be one to watch.

The Arts Collaboration Network (ACN) is an informal network of the main cultural sector support organisations and creative hubs within the Northern Irish cultural sector.

The network was formed in 2017, so existed prior to the pandemic, but its mobilisation was galvanised by the crisis. Its membership is not fixed and has continued to vary throughout the pandemic. However, its goals have been clear from the onset of the crisis: to advocate for the cultural sector and develop a space for collaborative leadership through events like the Big Gathering, an entirely online event held in August 2020 and open to anyone involved in the arts and creative ecology in Northern Ireland.

Throughout the pandemic, leaders from arts and creative organisations came together on a regular basis to share knowledge and develop a series of proposals in the form of public statements. These statements outlined several requests to the Northern Ireland Executive, which the network saw as vital to realising social and economic recovery and renewal beyond 2021. These requests were born out of extensive consultation with artists, creative freelancers, organisations and institutions. The members of the network that we interviewed described this period as time consuming and exhausting, but vital to gathering the necessary evidence to support and shape the requests. Interviewees also suggested that initially there was some dissent within the culture sector as to why it was the ACN and their collective voice that was representing them, but interviewees characterised this as inevitable when visibly lobbying the government.

In January 2021, the network published five requests to the government. One of these requests was a call to form an integrated arts and culture strategy co-created with a new NI Cultural Taskforce. In the summer of 2021, this taskforce was formed by the Department for Communities (DfC) and one of its long-term goals was to inform the development of a national culture strategy. Of course, the direct link between the network’s requests and the eventual policy response by the DfC cannot be entirely proved but it is undoubtedly an example of how influential networks such as the ACN have been over the pandemic. Further still, some of the network’s members have fed directly into the taskforce and continue to act as a strong voice for the sector.

Members of the network described the point at which they managed to get both arts council leaders and cultural representatives around the same table as a turning point during the pandemic. This was a recurrent theme; there has been a historic disconnect in bringing the many different components of the cultural sector together to discuss key issues. Interviewees reported that even though it took a pandemic to initiate this joined-up action, the power of collaborative leadership has been a key learning point for the cultural sector in Northern Ireland, but they remain cautiously optimistic as to whether these shifts will have long-term benefits for the sector.
What was, and what continues to be, the impact of the Covid-19 pandemic on the cultural sector? Across this report we have brought together various forms of research-led evidence to show the scale of the potential damage, the strength of the response, and the need for ongoing, and much more strategically targeted forms of future support.

The case studies presented in the previous section illustrate these three themes, showing how organisations were faced with an unprecedented crisis and how they were able to meet many of these challenges, but also how some policy interventions left staff and institutions to fall through gaps. Some notable aspects of these findings bear closer examination.

First, many organisations relied on new or existing networks to find solidarity and support, whether to co-discover new ways of working and even new business models (like the Edinburgh Fringe) or to collectively lobby funders and policymakers for additional interventions and support (as with Northern Ireland’s Arts Collaboration Network). This highlights the potential power and efficacy of collaborative working and leadership; but there is a real risk that this effective mode of working, which briefly united what is traditionally a fragmented sector, might disappear post-pandemic without targeted support.

Second, the case studies collectively illustrate the agility and creativity with which many cultural organisations responded to the pandemic. There is a tendency, also prevalent in the academic literature, to assume that smaller organisations are the “speedboats” (as one conference delegate expressed it), able to act rapidly, flexibly and nimbly in response to crises and changing landscapes, whereas larger organisations (the “steamliners”) chug along slowly and struggle to change course.

Third, our case studies confirm our broader finding of how Cultural Recovery Funding sustained many cultural venues through the worst phase of the pandemic, replacing the almost total loss of earned income caused by enforced closures. While there are certainly questions regarding the allocation of this funding, not least its failure to redistribute or “level up”, there is no doubt that emergency funding was distributed efficiently and rapidly (especially in England and Wales) and pre-existing requirements were often waived, saving many cultural organisations from permanent closure. However, cultural organisations also expressed frustration about policymakers’ lack of understanding of their business models when discussing how to target their funds.

Fourth, the case studies offer a personal insight into the psychological state of many cultural organisations at the end of this third phase. Cultural workers were still feeling “bruised” and many were very close to exhaustion and burnout. There were tensions between those who were furloughed and those who worked...
tirelessly throughout the pandemic, in the latter group there was a prevalent sense of “survivor’s guilt”, as one interviewee put it. Our research has demonstrated that the sector’s HR provision is not fit for purpose. Poor HR provision in the vast majority of organisations was an issue before the pandemic, so when the pandemic hit, organisations were exposed as under-resourced and under-developed in this area. There is now an urgent need to recruit and upskill in HR, not least so that organisations can start to address the significant employment gaps and ongoing health and wellbeing issues in a professional way.

Finally, the case studies paint a richer picture of what appeared to be a more general strategic shift towards civic and community engagement – a phenomenon that Mark Robinson referred to during our conference as a “pivot to purpose and people”. Our case studies highlight how this shift has engendered deeper engagement with both new and existing audiences: how in the case of Theatre Absolute it contributed towards a local place-shaping agenda; how in the case of the BALTIC it pushed the organisation to successfully redeploy the logistical skills of cultural workers to offer practical support; and how in the case of Sadler’s Wells it helped create a vital public information service.

Our cohort study of museums and galleries uncovered a potential shift away from an “exhibition economy” towards the idea of “activating collections”, a trend that reflects the slow, gradual and often misconceived implementation of the practices of participation and co-creation. Correspondingly, there are signs in our study of a “long-term shift towards compassionate and community leadership” with new (hybrid) roles emerging such as the BALTIC’s “Director of Enterprise and Public Value” – a job title that also suggests the business case for heightened community engagement. In summary, new models of leadership are emerging, propelled perhaps by a public upswell of empathy, compassion and care.

These findings are supported by our social media analysis, which demonstrated how content that privileged empathy and intimacy over traditional production values, and that connected arts and culture with place in ways that reaffirmed the importance of community, locality and nature, were particularly effective during the lockdown. There are important lessons for the future here as the cultural sector strives to re-emerge in a more equitable and sustainable way.

Our interviews with cultural workers and organisations have highlighted the need to reconceptualise the contested concept of “resilience” that continues to tie the sector in knots. Our research has shown that resilience, if understood in simple terms as the ability to survive and even prosper through challenging times, was directly linked to how well-networked an individual or organisation was before the pandemic. Prior to the pandemic, resilience was lazily equated with earned income, but as soon as the pandemic hit, earned income all but disappeared overnight. Many of our interviewees reported how their networks had boosted their skills, morale and capacity. This suggests not only that networks play a key role in supporting the cultural sector through a crisis but also that networks can build long-term resilience, which might better be understood in terms of collegiality and solidarity, or at least as a complex “bottom line”.

This finding supports the shift towards collective leadership highlighted earlier in the report and illustrated in our case studies. However, we must also sound a note of caution here. We know that networks can be exclusionary as well as supportive and we know that regardless of how well-networked certain freelancers were before the pandemic, it was ultimately their demographics, and often their apparently “protected” characteristics, that actually determined the number of hours they were able to work during the pandemic.

Touring exhibitions and productions were critical to the general health of the creative and cultural ecosystem pre-pandemic. However, cultural organisations are now facing increased costs and supply chain issues associated with touring cultural goods and workers, both domestically and internationally. Cultural organisations are now also contemplating significantly fewer tours in future, to support the UK’s drive towards net zero by 2050. Taken together, these additional pressures are likely to negatively impact rural and peripheral areas where high-quality touring may no longer venture. The sector will have to work closely with policymakers to overcome these challenges to ensure that communities in all parts of the country are able to engage with the full richness of the UK’s cultural offer.

The pandemic had a greater impact on freelance and self-employed workers, who constituted 62% of the core creative workforce before the pandemic and only 52% at the end of 2020. The significant failure of the relief funding was that it couldn’t easily be targeted directly at all of these workers, who constitute such a significant segment of the cultural sector. Perhaps the most significant finding from our study is therefore that we need to better understand the vital role that freelancers play in the cultural industries. This sector is idiosyncratic and exceptional and this sometimes-contested fact made it particularly challenging for policymakers to understand and support during the pandemic. The cultural sector is built from the grassroots up and out, so a trickle-down strategy to funding or emergency support will never fully penetrate complex cultural ecosystems or reach the parts that actually sustain the so-called “crown jewels”. Research clearly has a pivotal role to play here – and our research has highlighted the need to identify freelance cultural workers in a much more robust and nuanced way so that we can map the sector more accurately and appreciate its complex infrastructure.

More generally, as our analysis of the workforce has shown, the cultural sector’s pre-existing inequalities, precarities, and vulnerabilities were significant in shaping the pandemic outcomes for workers. The losses of jobs and hours were not felt evenly across all demographic groups. Alongside the need for targeted financial support, the pandemic has shown the need for major, perhaps revolutionary, changes in how the cultural sector views its work and workforce. From access to networks, issues of pay, assumptions about who is well-suited to which roles, through to the need for more recognition of caring responsibilities, the pandemic held a mirror up to a deeply unequal cultural sector.

In Greater Manchester, the local cultural ecosystem benefited from strong relationships with local government, which rallied with local cultural recovery plans, adjustments to funding requirements and in the case of the GMCA, a local government-led live-streaming initiative to crowdsource donations to a freelancer fund. Cross-sector collaboration enabled organisations to network with each other and associated freelancer communities, and to support independent artists through fundraising support, advisory sessions, bursaries and commissions. It traversed different scales of organisation in both private and public sectors, as arts commissioning and outdoor events were planned to drive up footfall in spaces newly abandoned by office commuters.

As indicated by audience and case study research, the pandemic heralded a reappraisal of “the local” with lockdown restrictions on travel and behaviour forcing cultural participation into the private, domestic sphere or into the open, at a distance in public space. The importance of the cultural and creative sectors to animate and stimulate night-time economies and own and city centre high streets was keenly felt, and cultural investment was made a key priority for the first round of “Leveling Up” funds and in many locally led recovery plans.

These new, impromptu programmes drew on the power of arts and culture to connect communities of practice and interest within their localities, serving vulnerable people with Creative Care Kits, commissioning artists for Covid-safe activities and turning cultural buildings into much-needed food banks and controversial Nightingale Courts. They brought home the importance of the place-based expertise and resources of local authorities, and their role as intermediaries for cultural organisations, making connections with many different areas of public service. In the context of the continuing impact of austerity on local authority budgets and decision making, combined with the economic effects of the pandemic, and the raft of additional administration around public health and safety,

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greater coordination between local and national government, grant-giving bodies and sector champions will be critical to place-based working and ensuring no place gets left behind. This includes the need to think outside of building-based “build back better” models, and to consider how collaboration can present opportunities across diverse cultural ecosystems and geographies, rather than relying on a trickle out from flagship venues within core city centres.

Many of the shifts in organisational behaviour were of course driven by changes in audience behaviour – or by the anticipation of or concerns about such change – and the emerging habits and needs of organisations’ immediate communities. Networks formed partly to help keep on top of trends and share “intel” about the impact on audiences of new ways of working. Agile, creative responses and new business models all emerged in anticipation of lasting changes in audience habits and preferences. Many organisations started listening more closely to their communities, and the appetite of most for access to audience data greatly increased. Even so, it was noticeable that the patterns and trends described by the Participation Monitor were not necessarily obvious to individual organisations: “live” issues, such as attitudes towards vaccines and vaccine passports continued to surprise, while perceptions of longer-lasting issues – such as the true, “highly engaged” profile of the digital audience and the increased demand from people with younger families – were obscure.

The pandemic highlighted the need for bigger-picture, dynamic, demand-side data and intelligence if organisations are to continue to build on newly developed muscles to work in an agile and user-centred way.

Looking forward, the Participation Monitor suggested a number of audience trends likely to demand these confident innovation behaviours. One probably pertains to the predicted shift towards more local living noted earlier. Another is the acceleration of an impending drop-off of baby-boomer audiences and their gradual displacement – or not – by future generations. We must also highlight the apparently growing, if diverse, interests in digital content from different groups of culture enthusiasts, especially as some sectors revert to previous in-person-only models. Similarly, while younger people and families continue to represent a higher proportion of potential audiences than before, it seems as though organisations able to adapt their offers and learn from doing so will thrive. Greater determination and commitment to change will also be required if the sector is to reverse the widening of the inequality gap triggered by the pandemic.

On the bright side, the general public’s attitudes towards the cultural sector seem to have warmed during the pandemic with a majority feeling concerned about the negative impacts of Covid-19 on the sector and now wanting to support arts and cultural organisations more than they did before. Many of our findings are perhaps unremarkable in that they were depressingly predictable: the existing structural inequalities on both the supply and demand sides of the UK’s cultural industries were well-documented before the pandemic, and incremental, evolutionary attempts to address them had singularly failed to shift the dial. While it will inevitably take decades to properly address the sector’s structural and systemic problems, the question is whether the Covid-19 pandemic will have garnered sufficient momentum to effect revolutionary change that will finally begin to make a positive difference.

It is by now almost a truism to assert that freelancers were the most severely impacted by the pandemic. Current data, business, tax and revenue systems fail to identify creative freelancers effectively at a sectoral and sub-sectoral level and the complex employment patterns prevalent across the sector (often rightly hailed for their loose-tie networks and resulting cross-pollination and innovation) mitigate against the simplistic targeting of financial support. We urgently need to develop a relatively straightforward means of identifying and supporting cultural freelancers. We also need to integrate them more effectively and generously into a less-fractured and more joined-up, collegiate sector to mitigate against the “ruptured trust” that has arisen during the pandemic between freelancers and cultural organisations. This will only happen if the early signs of more compassionate, community and collective leadership endure. Everyone working in and around the cultural sector has a responsibility here; but boards of trustees, funders and policymakers have a particular role to play in appointing and supporting the right leaders and then in holding them to account.

There is a danger that with distance we assume that there was a smooth journey through policy interventions over the course of the pandemic. However the reality was very different. Mixed messages, delayed and contradictory government announcements and a divergence of approach between England and the devolved nations made decision making within the sector extremely challenging and stressful and may have contributed to the reluctance of audiences to return. The impact on individual livelihoods and on the cultural infrastructure has not yet been fully realised.

Reflecting back on the immediate impact of the pandemic, there are some practical recommendations that must be stressed. The most important of these is the need for national and local governments to cohere and communicate clear public health and safety guidance to all cultural organisations at the onset of a health crisis or pandemic.
The lack of certainty and guidance caused chaos in cultural venues all over the UK and the slow closure of public venues almost definitely caused further spread of the virus. It certainly caused unnecessary stress and anxiety among the cultural workers whom we interviewed.

As redundancies began to hit the sector in Phase 2, some larger cultural organisations reported losing a generation’s worth of curatorial and stagecraft skills overnight. Cultural workers who did not lose their jobs seem to be “upskilling” ahead of an expected cultural recovery, rather than “reskilling” for other types of occupation. However, there are worrying signs that workers trained in administration, finance, human resources, fundraising, general management and operations are being tempted out of the cultural sector towards better paid jobs with less stressful working conditions and more sociable working hours. Policymakers, the cultural sector and trade unions should therefore develop strategies to ensure that administrative and managerial roles within the cultural sector remain attractive to experienced professionals. **There is an urgent need for a sector pay review and an ongoing need for training and development in areas of management, marketing, fundraising and HR.**

Our audience research has indicated that digital distribution is not the great equaliser or diversifier that much of the sector was hoping it was and even claiming it to be. Although the number of cultural engagements increased during the pandemic, the number of engagers remained stubbornly static. Nevertheless, an increased digital offer has certainly transformed the cultural experiences of many people with an established interest in the arts, especially disabled audiences and the large majority of older audiences living away from major urban centres. Most significantly, the digital offer inverts the age profile of audiences. **Whereas in-person engagement tends to be dominated by older people, the digital offer has a much younger (and more ethnically diverse) audience, with a distinct preference for more interactive, immersive experiences.**

The vast majority of those who increased their digital engagement during lockdown express an intention to do more in future. All of this points to the fact that digital culture is here to stay. The question is what role our cultural institutions will play in its creation and distribution and how it will interact with the in-person experience. It is certainly worth investing in the sector’s capacity to be a player in this arena, not just to increase and deepen audiences’ experiences but to anticipate cultural engagement for future generations. **Targeted investment in digital production, distribution and engagement therefore appears to be a policy priority and our evidence suggests that any investment should be directed at findability and encouragement of continued experimentation in digital-first and digital-blend content.**

As we conclude this report, the pandemic still poses a significant threat to the cultural sector. Cases of Covid-19 are again rising across much of the world and audiences are proving slow to return to live events. **Business models that embrace a hybrid strategy are likely to fare well as the sector slowly emerges exhausted from the pandemic. Digital innovation can make a positive difference, but only when embedded in a long-term strategy of audience and school engagement.** Indeed relationships between many cultural organisations and schools have flourished during the pandemic. But without some rest and restoration, there is a real danger that much of the good work undertaken during the pandemic will be undone.

**The UK’s cultural sector is undoubtedly at an inflection point and facing imminent burnout as well as skills and workforce gaps. It therefore urgently needs to adopt regenerative modes of working. A regenerative approach would carve out time for rest, recuperation, wellbeing and celebration. But it also involves sacrifices: less relentless producing and production, less product and income, less hidden labour and overworking, less solipsism and introspection.**

This vision seemed to strike a chord with our conference delegates; but it can only be realised if the cultural sector keeps working together as a joined-up ecosystem and doesn’t rupture at the seams.
# Policy timeline

## Phase 1: March to Autumn 2020

### Immediate Impact

<table>
<thead>
<tr>
<th>Date</th>
<th>England                                                                 history of lockdown/restrictions information</th>
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<td>£30bn package of business reliefs and loans announced by Treasury</td>
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<td>Theatres, cinemas, gyms, leisure centres, cafe, restaurants, pubs and bars closed</td>
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<td>20 March</td>
<td>Job Retention Scheme (furlough) announced</td>
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<tr>
<td>27 March</td>
<td>Creative Scotland Bridging Bursary Fund, £2m for freelance cultural workers</td>
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<tr>
<td>27 March</td>
<td>Screen Scotland Bridging Bursary Fund, £15m for freelance workers in the screen sector</td>
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<tr>
<td>27 March</td>
<td>Open Fund: Sustaining Creative Development, £75m</td>
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<tr>
<td>27 March</td>
<td>Open Fund: for individuals, fund of £5m supporting artistic activity</td>
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**Bold text** relates to Covid lockdown/restrictions information

<table>
<thead>
<tr>
<th>2020</th>
<th>WHO declares pandemic 11 March</th>
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<td></td>
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<tr>
<td>23 March</td>
<td>UK-wide lockdown #1 announced</td>
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<td>25 March</td>
<td>Coronavirus Act 2020 granted Royal Assent</td>
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<tr>
<td>26 March</td>
<td>Support for self-employed (SEISS) announced</td>
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### April

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<tr>
<td>7 April</td>
<td>DCMS Select Committee enquiry into impact of Covid-19 on DCMS sectors launches</td>
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<tr>
<td>10 April</td>
<td>Five-tier alert levels implemented by UK Government</td>
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<td>10 April</td>
<td>Four nations “stay at home” policy approach diverges between England, Scotland, Wales and NI</td>
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<td>16 April</td>
<td>Lockdown #1 extended for at least 3 weeks</td>
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<td>9 April</td>
<td>Arts Council England's (ACE) Emergency Fund opens Round 1 of the Emergency Response Fund for creative practitioners in England</td>
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<td>27 April</td>
<td>Arts Council of Northern Ireland (ACNI) launches £500k Artists Emergency Programme (AEP)</td>
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<tr>
<td>13 April</td>
<td>Scottish Council for Voluntary Organisations (SCVO) launches Wellbeing Fund of £50m for third sector</td>
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<tr>
<td>15 April</td>
<td>Scottish Government announces support package, covering: £34m Newly Self-Employed Hardship Fund, £20m Creative, Tourism and Hospitality Enterprises Hardship Fund, £45m Pivotal Enterprise Resilience Fund (10% of beneficiaries from Cultural Industries)</td>
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<tr>
<td>21 April</td>
<td>Scottish Government launches Clear Your Head mental health campaign, linked to £50m Wellbeing Fund</td>
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**Culture in Crisis:** Impacts of Covid-19 on the UK cultural sector and where we go from here
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<tr>
<td><strong>May</strong></td>
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<tr>
<td>11 May</td>
<td>Those who cannot work from home return to workplaces</td>
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<tr>
<td>11 May</td>
<td>UK Government launch “Our Plan to Rebuild”; cultural venues cited as partially reopening at Stage 3</td>
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<tr>
<td>12 May</td>
<td>Furlough scheme extended until end of October 2020</td>
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<tr>
<td>13 May</td>
<td>SEISS opens for Round 1 applications</td>
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<tr>
<td>12 May</td>
<td>ACE launches £90m financial support for NPOs and CPP organisations</td>
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<tr>
<td>6 May</td>
<td>ACNI launches £25k Deaf/Disabled Artist Support Fund</td>
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<tr>
<td>4 May</td>
<td>Scottish Government launches Caring Communities community support campaign</td>
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<tr>
<td>7 May</td>
<td>Scottish Government launches Connecting Scotland, a £5m programme to address digital poverty</td>
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<tr>
<td>21 May</td>
<td>Scottish Government publishes the “route map” framework for staged reopening</td>
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<td><strong>June</strong></td>
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<tr>
<td>1 June</td>
<td>NI Executive launches £500k Organisations Emergency Programme (OEP)</td>
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<td>23 June</td>
<td>NI Executive launches Support for the Individual Artist Programme (SIAP)</td>
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<td>10 June</td>
<td>Scottish Government launches the Scottish Recovery Tourism Taskforce to assist reopening</td>
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<td></td>
<td>Scottish Government distributes £257.6m to local councils to support local services</td>
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<tr>
<td>29 June</td>
<td>Scottish Government provides Edinburgh Fringe Society with a £1m interest-free loan</td>
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<tr>
<td><strong>July</strong></td>
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<tr>
<td>5 July</td>
<td>DCMS launches £1.57bn Culture Recovery Fund (CRF)</td>
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<tr>
<td>8 July</td>
<td>UK Government delivers a “mini-Budget” including a “Plan for Jobs” with a Job Retention Bonus scheme</td>
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<tr>
<td>23 July</td>
<td>DCMS Select Committee publishes first report on impact of Covid-19 on DCMS sectors</td>
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<tr>
<td>Early July</td>
<td>Restrictions are lifted in some parts of the UK, seeing some cultural venues reopen, while other nations and regions go into localised lockdowns</td>
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<tr>
<td>4 July</td>
<td>First local lockdown</td>
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<tr>
<td>30 July</td>
<td>Local restrictions in parts of England</td>
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<tr>
<td>3 July</td>
<td>NI Executive reopens museums, galleries and heritage sites with social distancing measures, though theatres, nightclubs and performing arts venues remain closed</td>
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<tr>
<td></td>
<td>NI receives £33m from the CRF with £29m going to arts, culture and heritage. The £4m remainder was used to cover the initial £4m emergency funding phase. Not delivered fully until March 2021 (various funds delivered under schemes see <a href="https://www.communities-ni.gov.uk/articles/funding-arts-culture-and-heritage-sectors">https://www.communities-ni.gov.uk/articles/funding-arts-culture-and-heritage-sectors</a>)</td>
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<tr>
<td>15 July</td>
<td>Scottish Government launches Phase 3 of route map out of lockdown (reopening of some museums, galleries, cinemas and libraries with social distancing measures)</td>
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<tr>
<td>25 July</td>
<td>Museums Galleries Scotland launches Museums Resilience and Recovery Fund of £4m</td>
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<tr>
<td>26 July</td>
<td>Scottish Government launches £10m funding for events and festivals sector</td>
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*Culture in Crisis: Impacts of Covid-19 on the UK cultural sector and where we go from here*
### Phase 2: Autumn 2020 to Spring/Summer 2021

#### Winter Lockdown

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<tr>
<td>15 September – “Working Safely through Covid-19: Seven Inclusive Principles for Arts &amp; Cultural Organisations” guidance is published</td>
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<td>24 September – UK Government launches the “Winter Economy Plan” with new Job Support Scheme and SEISS extension</td>
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<tr>
<td>September 2020–August 2021 – Policy divergence between the “four nations” continues: some cultural venues reopen in some nations while others are caught by localised lockdowns</td>
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**September**

| 14 September – Additional restrictions implemented (including “rule of 6”) |
| 24 September – 10pm curfew begins and home working implemented |
| 10 September – NI Executive introduces localised restrictions in a number of postcode areas for two weeks (minimum) |
| 18 September – Art Galleries reopen |
| 22 September – NI Executive extends current localised restrictions to all NI households |

**October**

| 10 September – Restrictions on social gatherings reintroduced, theatres and live venues remain closed |
| 11 September – Creative Scotland launches £5m Hardship Fund for creative freelancers |
| 14 September – Scottish Government launches the Independent Cinemas Recovery and Resilience Fund, £3.55m |
| 24 September – NI Executive announce £29m Culture Recovery package |
| 16 September – Welsh Government publishes guidelines on performances and rehearsals |
| 18 September – The Creative Industries Clusters Programme and Creative Wales announce £500k fund for 33 creative and cultural organisations, working with 10 freelancers |

| 8 September – ACW launches Sharing Together Fund to support existing and emerging networks in cultural sector |
| 16 September – Welsh Government publishes guidelines on performances and rehearsals |
| 18 September – The Creative Industries Clusters Programme and Creative Wales announce £500k fund for 33 creative and cultural organisations, working with 10 freelancers |

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**Phase 1: Spring to Early Summer 2020**

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<tr>
<td>3 August to 1 September – Eat Out to Help Out scheme announced: Subsidies of up to 50% for people to eat in pubs and restaurants</td>
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<tr>
<td>10 August – CRF Round 1 opens for applications</td>
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<tr>
<td>14 August – Lockdown restrictions eased, including opening of indoor cultural venues</td>
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<tr>
<td>21 August – CRF Round 2 opens for applications</td>
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<tr>
<td>16 August – £3.8m for National Trust Scotland</td>
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<td>26 August – Grassroots Music Venues Stabilisation Fund, £2.2m</td>
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<tr>
<td>28 August – Scottish Government announces £59m emergency funding package for culture and heritage, distributed through Creative Scotland</td>
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**Culture in Crisis: Impacts of Covid-19 on the UK cultural sector and where we go from here**

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<tr>
<td>16 August – £3.8m for National Trust Scotland</td>
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<td>26 August – Grassroots Music Venues Stabilisation Fund, £2.2m</td>
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<td>28 August – Scottish Government announces £59m emergency funding package for culture and heritage, distributed through Creative Scotland</td>
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<tr>
<td>15 September – “Working Safely through Covid-19: Seven Inclusive Principles for Arts &amp; Cultural Organisations” guidance is published</td>
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<td>24 September – UK Government launches the “Winter Economy Plan” with new Job Support Scheme and SEISS extension</td>
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<td>September 2020–August 2021 – Policy divergence between the “four nations” continues: some cultural venues reopen in some nations while others are caught by localised lockdowns</td>
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<td>Month</td>
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<tr>
<td><strong>October</strong></td>
<td>12 October – Three-tier local tiering system introduced</td>
<td>20 October – ACNI launches £3.8m Individuals Emergency Resilience Programme (IERP) in collaboration with Future Screens NI</td>
<td>9 October – Scottish Government launches Covid-19 Restrictions Fund, includes one-off grants for businesses required to close by Covid regulations, hardship funds, and support for re-furloughing, £40m</td>
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<td>14 October – NI Executive announces tighter restrictions to curb Covid-19 from 16 October for four weeks (the retail sector stays open)</td>
<td>23 October – Scottish Government introduces a five-tier local system</td>
<td>7 October – ACW launches £15m Connect and Flourish (Round 1) scheme for grants between £500–£150k</td>
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</tbody>
</table>

**Lockdown #2 in England, followed by patchwork of national and localised regional lockdowns.**

5 November 2020 – UK Government extend furlough second round to end of March 2021. SEISS confirmed at 80% of trading profits to end of March 2021

<table>
<thead>
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<tr>
<td><strong>November</strong></td>
<td>5 November – Lockdown #2 in England via tiered approach</td>
<td>9 November – NI Executive announces additional £1.5m for arts, culture and heritage renewal projects</td>
<td>16 November – NI Executive enhances Covid-19 self-isolation grant, offering an increased daily allowance and an extension on the number of days which can be covered</td>
<td>3 November – Local lockdown rules introduced to combat second wave</td>
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<td>19 November – The NI Executive introduces a four-week “Circuit Breaker” lockdown where venues are forced to close</td>
<td>26 November – Creative Scotland launches Culture Collective Fund, £6m to support creative projects and infrastructure development with local authorities</td>
<td>26 November – Creative Scotland launches the Youth Arts Fund package of £3m</td>
<td>5 November – Creative Scotland launches Culture Collective Fund, £6m to support creative projects and infrastructure development with local authorities</td>
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<td>19 November – The NI Executive introduces a four-week “Circuit Breaker” lockdown where venues are forced to close</td>
<td>30 November – Scottish Government announces £11.8m fund for businesses to invest in digital</td>
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<td>26 Dec 2020–Jan 2021 – “Tier 4” lockdown restrictions including social distancing (rule of 6) imposed</td>
<td>14 December – First vaccinations take place</td>
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<td></td>
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<td>19 December – Tightening of restrictions</td>
<td>20 December – “Tier 4” lockdown restrictions reintroduced</td>
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<td><strong>2021</strong></td>
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**January 2021**

- 6 January – Lockdown restrictions reintroduced
- 6 January – CRF 2 opens for applications

- 4 January – Lockdown announced in Scotland
- 17 January – Scottish Government announce that three major charitable arts organisations will receive a share of £6m emergency support
- 22 January – National Partnership for Culture work programme published, to “provide a voice for the sector” to inform long-term policy response to the pandemic

**February 2021**

- 23 February – ACE publish roadmap for easing of restrictions for arts and culture
- 24 February – NI Executive introduces £6.9m to support individual artists as part of Individual Emergency Resilience Programme
- 17 February – Hardship Fund for Creative Freelancers and Screen Hardship Fund top-up, £5m
- 17 February – ACW opens Connect and Flourish Round 2 (£2.7m of the £5m total)
- 10 February – Freelancer Fund extended by £8.9m for existing grant holders

**3-10 May 2021** – The four Chief Medical Officers of the UK agree to reduce the UK Covid-19 alert level from level 4 to level 3

- 17 April – CRF 2 extension announced for support up to September
- 12 April – DCMS launches Events Research Programme with pilot event at World Snooker Championships

**March 2021**

- 17 April – CRF 2 extension announced for support up to September
- 4 March 2021 – UK Government present the 2021 Budget (including SEISS Round 4 for February to April 2021 and SEISS Round 5 to September 2021)

**April 2021**

- 17 April – DCMS opens Connect and Flourish Round 2 (£2.7m of the £5m total)
- 10 February – Freelancer Fund extended by £8.9m for existing grant holders
- 19 February – Restrictions begin to ease

**May 2021**

- 15 May – Final Events Research Programme pilot event at Wembley for FA Cup Final concludes
- 18 May – Taskforce and cultural strategy (announced)
- 17 May – Most of Scotland moved to Level 2 restrictions, allowing theatres, cinemas, and live venues to reopen
- 10 May – Welsh Government announce series of pilot test events
- 14 May – Wales moves into alert level 2, allowing indoor cultural venues to reopen

**June 2021**

- 21 June – DCMS Events Research Programme first report published
- 17 June – Creative Scotland open Culture Organisations and Venues Recovery Fund: Round 2, £25m
- 17 June – Creative Scotland open Performing Arts Venues Relief Fund: Round 2, £25m
- 17 June – Welsh Government place four-week pause on lifting of restrictions
Phase 3: Summer to November 2021
Ongoing and Long-Term Impact

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<td>19 July – Scotland moves to alert level 0</td>
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<td>Open 16 August 2021 – CRF 3 opens: Continuity Support for organisations that have received support through CRF 1 and 2</td>
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<td>August</td>
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<td>23 August – Scottish Government launch £6750k touring fund for live music</td>
<td>5 August – Wales moves to alert level 0</td>
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<td>September</td>
<td>16 September – NI Executive announces £500k grant from the Dormant Accounts Fund to Arts and Business NI</td>
<td>7 September – “A Fairer, Greener Scotland” programme for government published, outlining strategic vision for culture and announcing a cultural policy review in response to the pandemic</td>
<td>10 September – Scottish Government launch the Public Libraries COVID Recovery Fund to help libraries to reopen</td>
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<table>
<thead>
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<td>13 October – ACNI launches the Health and Safety Capital Programme – £750k</td>
<td>1 October – Scottish Government introduces the COVID Certification Scheme. Requires people to prove their vaccination status to gain access to venues</td>
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<td>1 October – Scottish Government makes the Covid certification scheme enforceable</td>
<td>11 October – Welsh Government implement “NHS Covid Passes” for large events, nightclubs and similar venues</td>
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We would like to thank the Arts and Humanities Research Council (AHRC) and UK Research and Innovation (UKRI) for their generous funding of this research. We would also like to thank the core funders of the Centre for Cultural Value (AHRC, Arts Council England and Paul Hamlyn Foundation) and our colleagues at the University of Leeds for their ongoing support for the Centre. Thank you also go to our project partners, our Policy Reference Group and all those who participated in our Covid research conference in November 2021. Heartfelt thanks go to our dedicated Advisory Group, who provided expert support and guidance over the course of the project: Geoffrey Crossick, Alastair Evans, Sharon Heal, Sarie Mairs-Slee, Harman Sagger, Jose Seisdedos, Liz Thompson and Michelle Wright.

Most importantly, we would like to thank all of our research participants who generously gave their time in what for many were very challenging personal and professional circumstances. Over the course of the project we interviewed over 230 cultural sector professionals, ranging from freelancers and general managers of micro organisations to representatives of large regional and national cultural organisations, funders and policymakers. Along the journey we interviewed employees from the following organisations, and we’d like to thank them for providing us with such a privileged insight into their worlds as they shifted over the course of the pandemic in 2020/21.

Acknowledgements and credits

We are very grateful to those organisations who generously agreed to host one of our policy placements: Creative Scotland, Department for Communities (Northern Ireland), Department for Digital, Culture, Media and Sport (UK), Greater Manchester Combined Authority, Leeds City Council and the Welsh Government’s Department for Culture, Heritage, Sport & Tourism.

Aberdeen City Council
Aberdare Council
Africa in Motion
Ambassadors Theatre Group
Angus Council
Anstrim & Newtownabbey Borough Council/Society of Local Authority Chief Executives
Argyll and Bute Council
Arts’ Union
Arts Collaboration Network
Arts Council England
Arts Council Wales
ArtsEkta
Arts Funding and Philanthropy
Arts Marketing Association
Assembly Festival
BALTIC
BBC Wales
BECTU
Belfast City Council
Big Burns Supper
Bolton Local Authority
Bolton Octagon
Brighter Sounds
British Library
Bury Art Museum
Bury Local Authority
Bute Fest
CAST Doncaster
Cause 4
Clackmannanshire Council
Collective Encounters
Creative & Cultural Skills
Creative Scotland
Creative Wales
Culture Perth and Kinross
Dumfries and Galloway Council
Dumfries and Galloway Music and Arts Festival
Dundee City Council
East Ayrshire Council
East Dunbartonshire Council
East Lothian Council
East Renfrewshire Council
Edinburgh Arts Festival
Edinburgh City Council
Edinburgh Fringe Society
Edinburgh Science Festival
Falkirk Council
Fermanagh and Omagh District Council (NI)
Fife Council
Fringe Society
Frog and Bucket
Glasgow City Council
Glasgow International
Glasgow Life
GM Artist Hub
Gorilla TV
Grand Opera House Belfast
Greater Manchester Combined Authority
Hebridean Dark Skies Festival
Helfix Arts
High Life Highland
Highland Council
Highland Games Association
Holden Gallery
HOME Manchester
In Situ
In Your Space Circus
Inverclyde Council
ITV Wales
Javada Alipour Theatre Company
Jaso
Kneehigh Theatre
Lakes International Comic Arts Festival
Lammermuir Classical Music Festival
Link4Life
Little Theatre Sheringham / St George’s Theatre Great Yarmouth
Live Borders
Ludlow Street
Macclesfield Museums
Manchester Art Gallery
Manchester City Council
Manchester City of Literature
Manchester Museum
Manchester Palace & Opera House (Ambassadors Theatre Group)
Manchester Science and Industry Museum
Marketing Manchester
MediaCity
Midlothian Council
MIF/The Factory
Moray Council
Museums Association
National Glass Centre (Sunderland Culture)
National Museums Liverpool (Museum of Liverpool)
National Theatre
Newbridge
North Ayrshire Council
North East Cultural Freelancers Network
North East Cultural Partnership
North East Regional Museum Development Office
North Lanarkshire Council
Nottingham Playhouse
Octagon Theatre Bolton
Oldham Coliseum
Oldham Local Authority
Orkney Islands Council
Orkney Music Festival
Paisley Book Festival
Perth and Kinross Council
PINK
Quays Culture
Queen’s Theatre, Hornchurch
Red Ladder Theatre
Renfrewshire Council
Renfrewshire Leisure
RHS Gardens Bridgewater
Rochdale Local Authority
Rogue Studios
Royal Exchange
SaC
Salford City Council
Salford Community Leisure
Salford Culture and Place Partnership
Salford Museum and Art Gallery
Science and Industry Museum
Scottish Borders Council
Shetland Islands Council
Skills Development Scotland
Slam Media
South Ayrshire Council
South Lanarkshire Council
Steddal Festival
Stendhal Festival
Strirling Council
Sunderland Culture
Sunderland Empire
TAC (Teledwyr Annibyniol Cymru): Welsh Independent Producers
Take Art
Tameside Council
Tara Arts
Telesgop
The Grand Theatre
The Lowry
The Royal Exchange
The Wardrobe Ensemble
The Whitworth
The Williamson
Theatre Absolute
Theatre Royal Wakefield
Thrive
Trafford Local Authority
Tyne & Wear Archives & Museums
University of Salford
Venture Arts
Visit Scotland
Walk the Plank
Wardrobe Theatre
Waterside Arts Centre
West Dunbartonshire Council
West LOTHIAN Council
West LOTHIAN Leisure
Western Isles Council (Comhairle nan Eilean Siar)
Whitworth / Manchester Art Gallery
Wigan Council
Young Identity

Visit Scotland
This report was co-authored by the following members of the project’s research and policy engagement team: Danielle Child, Benjamin Dunn, Tal Feder, Rebecca Flonisson, Abigail Gilmore, Karen Gray, Sue Hayton, Jenny Kidd, Siobhan McAndrew, Eva Nieto McAvoy, Trevor MacFarlane, Oliver Mantell, Dave O’Brien, Ana Ostrowska, Mark Taylor, Anne Torreggiani, Ben Walmsley, Harry Weeks and John Wright. The wider research team comprised: Maria Barrett, Bruce Davenport, John Davies, Rachel Johnson, Gwylm Owen, Bethany Rowley and Richard Turpin.

The wider project coordination and policy engagement team comprised: Julieta Cuneo, Tamsin Curror, Eliza Easton, Daniela Gerstmann, Liz Harrop, Alex Lancaster, Fanny Martin, Tammi Murphy and Alice Nightingale. Report design is by North Creative Studio (www.northcreativestudio.co.uk).

The research was led by the Centre for Cultural Value in collaboration with The Audience Agency and the Creative Industries Policy and Evidence Centre.

Afterword

When the Covid-19 pandemic hit in March 2020, the Centre for Cultural Value had been up and running for just over five months. It quickly became apparent that in order to realise our aim of developing a shared understanding of the differences that arts, culture, heritage and screen make to people’s lives and to society, we would need to carefully track the rapidly evolving impacts of the pandemic on the cultural sector. Like everyone else at the time, we were unsure what kind of cultural sector would emerge at the end of the crisis. Although this picture is becoming clearer as I write this afterword in January 2022, the future direction of the sector remains very much in the balance.

The Centre for Cultural Value was initially funded to undertake secondary research, to scope and synthesise existing studies on the values and impacts of arts and culture, and to disseminate these to key audiences. The Covid-19 pandemic highlighted the need for us to also undertake urgent, empirical research and rapidly cemented our role as a broker of national research networks in the cultural sector. It also underlined the need for centres like ours to engage regularly with policymakers at the local, regional and national level throughout the course of the pandemic.

The Centre for Cultural Value will now be taking the study findings forward to inform a series of policy recommendations to share with the sector and policymakers in the first quarter of 2022 in partnership with Culture Commons.

As well as acknowledging the generous support of our funders and the vital engagement of all of our research participants, I would personally like to thank our project partners The Audience Agency, the Creative Industries Policy and Evidence Centre, and Culture Commons, as well as the core team at the Centre for Cultural Value and all of my colleagues in the project team who worked above and beyond their allocated hours to produce what I believe to be one of the most meticulous and comprehensive studies of the impact of Covid-19 on the cultural sector that has been undertaken anywhere in the world. This report is testament to their hard work and also to the dedication of everyone who has kept the cultural sector alive during its darkest hours.

Ben Walmsley
Director, Centre for Cultural Value

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Page 2: The Lowry in lockdown. Photo: Nathan Chandler

Page 8: The Lowry in lockdown. Photo: Nathan Chandler

Page 23: The Frontline by an anonymous painter. Part of the Days Like These exhibition, sharing the stories of Salford in 2020. Photo: The Lowry

Page 24: A socially distanced visitor at Hebrew Manuscripts: Journeys of the Written Word exhibition at British Library St Pancras. Photo: David Jensen


Page 48: Bard in the Yard, Pleasance Courtyard, Edinburgh Fringe 2021 Photo: Julie Howden

Page 51: Circuit at The Lowry. Photo: The Lowry

Page 53: BALTIC Front Room 2021. Photo: Colin Davison © 2021 BALTIC Centre for Contemporary Art

Page 55: “This Poem Is For You” by Andrea Mbaruishima, Shop Front Theatre, Coventry, commissioned by Theatre Absolute. Photo: Andrew Moore

Page 57: A socially distanced visitor at the Unfinished Business: The Fight for Women’s Rights exhibition at British Library St Pancras. Photo: David Jensen

Page 59: Filming of Natur a Ni for S4C during the Covid-19 pandemic. Photo: Gary Pritchard

Page 62: Museum visitors explore Refugees, a free season of major exhibitions, artistic commissions and immersive events that took place across IWM London and IWM North in 2020 and 2021. Photo: © IWM

Page 69: Days Like These exhibition at The Lowry. Photo: The Lowry

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