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# Culture in Crisis

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

Executive Summary

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## Executive summary

**This extensive study of the impacts of Covid-19 on the UK's cultural industries took place between September 2020 and November 2021. It was delivered by an interdisciplinary project team of 35 people from across the UK and involved a combination of complementary methods. The team conducted over 230 interviews with cultural sector professionals and analysed the data thematically to highlight the most significant impacts and implications. The interview data was supplemented by: quantitative analysis of Labour Force Survey (LFS) data, a population survey of cultural engagement, social media analysis and an ecosystem analysis of Greater Manchester.**

In **Phase 1** of the pandemic (March–Autumn 2020), our research captured the seismic shock of the pandemic on the UK's cultural sector. In the initial days, **cultural venues** scrambled to shut down quickly and safely in the absence of any clear national guidance. Most venues lost their earned income overnight as their retail outlets closed, box offices shut and ghost lights came on. Cash reserves dwindled in months and most **cultural organisations** spent significant time and effort making their spaces and activities “Covid-secure” for visitors, often implementing advanced booking systems. Another key task was writing applications for the Cultural Recovery Fund (CRF). The visibility of the Black Lives Matter movement in 2020 also prompted many institutions to analyse and address the poor diversity of their workforces and boards. Closed to the public, festivals explored digital modes of engagement and some found new international audiences.

Some **freelancers** found themselves without any immediate source of income as emergency relief often excluded those with portfolio careers, many existing contracts were not honoured and some creative freelancers took work in other sectors to survive. The most dramatic decline was observed in music, performing and visual arts, where the professional workforce fell by around a quarter between March and June 2020, with no signs of significant recovery by

the end of the year. However, established freelancers who were well-networked or had strong digital skills sometimes found themselves more in demand than they had before the pandemic.

**Audiences**, meanwhile, migrated online to access speedily repurposed and repackaged cultural content. But although the shift to digital made some content cheaper and more accessible for existing audiences, it failed to diversify the audience base: what we ultimately witnessed was more cultural attendances from roughly the same number and type of attenders. However, some **local communities and schools** did benefit from a simultaneous shift to hyperlocal engagement, particularly from museums, galleries and smaller theatre companies. In the Twittersphere, national initiatives such as #CultureInQuarantine and #MuseumAtHome attracted thousands, and in general audiences were most drawn to content that privileged empathy, intimacy, community, locality and nature.

Our research on **Manchester city-region's** cultural ecosystem quickly identified key attributes which served to mediate, if not fully mitigate, the immediate impacts of the pandemic. These were: the close cooperation of local authorities; long-standing political engagement in the contribution of arts and culture to wider place priorities; the strength of network ties, sector-led cultural

partnerships and governance; and an established infrastructure of publicly funded cultural organisations.

In **Phase 2** (Autumn 2020–Spring/Summer 2021) audiences’ confidence in returning to cultural venues remained stubbornly low. However, most (80%) said that taking part in arts and culture was important to their **wellbeing** and a majority said that attending or taking part in creative activities and digital culture positively affected their mood and helped them to manage anxiety. Despite the relative importance of **digital content** in this phase of the pandemic, it was still only accessed by a minority of the population (43%) and largely by the same people who had accessed it before. Digital engagement skewed towards particular groups of existing audiences, including younger people (66% of 16–24-year-olds), those based in London (53%), and people from Black, Asian and mixed backgrounds (68%, 55% and 60%). **Disabled audiences** 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.

For **galleries and museums**, a blend of digital and in-person delivery continued. 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 by rethinking how to maximise their impact when reopening instead of returning to the “exhibition economy”.

Phase 2 saw a recovery in **working hours** in the core creative occupations, but the overall number of hours worked was still lower than the average level in 2019. However, there were significant differences between different sub-sectors: by the end of 2020, average working hours of publishing occupations had actually surpassed pre-pandemic levels. The recovery of activity in film, TV, video, radio, photography, museums, galleries and libraries also continued, despite still not reaching pre-pandemic levels. By comparison, working hours in music, performing and visual arts showed no real recovery at any point in 2020. 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 there were instances of unsafe working conditions.

In other sub-sectors, tensions grew between those on furlough and those who had continued to work. Some interviewees expressed resentment that those on furlough were actually doing paid work in other sectors. While the spring 2021 roadmap provided a firm date for reopening, this also increased **workloads** for those still working in the sector and there were continuing concerns for **mental health and wellbeing** amidst growing talk of burnout. Tensions also grew between sector employees and freelancers, some of whom were now really struggling to maintain a livelihood.

For cultural organisations, **continuing uncertainty was mitigated by two rounds of Cultural Recovery Funding (CRF) and the continuation of the furlough scheme**. In Northern Ireland, however, the delay in the delivery of Cultural Recovery Funding began to take its toll on organisations that were already in precarious financial situations; and many commercial producers and those building-based organisations dependent on earned income remained largely “mothballed”. Many organisations reported eating into their reserves and confided that uncertainty around if and when funding would arrive was causing emotional, logistical and financial stress. Interviewees also highlighted that the crisis had exposed the issue of poor digital skills.

**Greater Manchester** (GM) and other parts of northern England were put under additional local lockdown restrictions for most of the second half of 2020, at odds with the rest of the country. These impacted on the cultural and hospitality sectors in GM 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. The first round of **CRF** awards was announced in November 2020, followed by the Capital Cultural Kickstart in December, and Round 2 of the CRF 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 and over 25% comprised capital for building projects, including £21m to the Factory. Some organisations accessed public funds for the first time, with 75% of funds to the city centre going to non-NPOs. 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. The rapid support and flexibility from arm’s-length bodies such as Arts Council England was acknowledged and appreciated. However, central government messaging caused concern: a frequent observation was that 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.

By **Phase 3** (Summer–November 2021) the dual pressures of a 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 and **signs of an impending burnout increased**. While some senior leaders had put in place packages to support their staff teams, worries about the mental health impact of continuing to overwork in a climate of volatility and risk remained live. Interviewees in the screen sector were more positive, however, speaking of a bright future, especially for film and high-end TV drama. Freelancers in this sector seemed to be in high demand, often enjoying higher pay rates.

Confirming our population surveys, cultural organisations reported **audiences** as being “terrifyingly” slow to book, although this differed according to genre, location and audience segment, with commercial and London venues holding up better than the subsidised sector and other regions. In this uncertain context, the absence of clear and consistent rules around social distancing and wearing of masks in England, as well as the summer “pingdemic”, were not viewed as helpful. However, many organisations felt they were now reaping the benefits of **dedicated time to think and plan strategically**. Many felt they were better able to articulate their social missions, while others have diversified their boards and enrolled their staff in **diversity** and/or anti-racism training. A majority were also considering how to cement relationships with local and **community partners** and how this might support future funding.

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 and cultural occupations and these **existing inequalities**

**predetermined the uneven impacts of the pandemic**. For women in creative occupations, the pandemic halted recent trends towards greater female representation, with certain occupations witnessing a “levelling down” in hours worked. For ethnically diverse workers, the picture was obscured by small sample sizes in the LFS, but there were nevertheless clear differences: notably in music, performing and visual arts, ethnically diverse workers saw larger reductions in hours during the pandemic than their white colleagues. Our analysis demonstrated that more highly educated core creative workers recovered their hours of work at a faster pace than those with fewer formal qualifications. However, in terms of hours worked at least, the pandemic seemed to have similar impacts on disabled creative workers as on other creative workers.

Following “Freedom Day” on 19 July, concerts, events and some festivals went ahead in **Greater Manchester** and this dynamic city-region saw new open-air venues launching, including outdoor cultural venues such as Homeground. Despite this renewed vibrancy, the tentative move to an endemic stage of Covid-19 was characterised by reduced consumer confidence, uncertainty from cultural organisations and policymakers, untested business models, and sector burnout.

The proportion of the **population** who were “happy to attend” increased slightly in Phase 3, with a full third “happy to attend”, but still only 30% who would consider attending with reservations. These figures only increased a couple of percentage points for those who’d attended in the 12 months before the pandemic, which suggested that in November 2021 **a full third of regular audiences were still reluctant to return**.

A majority of the public in Phase 3 expected Covid-19 to “still have an impact on our lives and activities” well into the future. If this majority is right, **Covid-19 will have impacted almost four years of cultural engagement**. Our research indicates that younger people are keener to return, effecting a shift in aggregate tastes. People are expecting to attend indoor events less and to attend more locally. We have seen new possibilities from digital engagement and new appetite for hybrid live and digital approaches. Although digital engagement levels have been falling, digital looks like it will have an enhanced role in cultural engagement in future. Indeed **it is likely that both the supply and demand for culture will have changed in ways that will not “snap back”**.

# Key findings and conclusions

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.

With **freelancers and the self-employed** constituting a significant part of the cultural sector, targeted financial support was vital during the crisis to ensure that the sector remained stable. The pandemic had a greater impact on freelance workers, who constituted 62% of the core creative workforce before the pandemic and only 52% at the end of 2020. 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 left 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 has a pivotal role to play** here – and our research has highlighted the need to identify freelance cultural workers in a much more robust way so that we can map the sector more accurately and appreciate its complex infrastructure.

Our analysis of **the cultural workforce** once again highlighted the sector’s pre-existing inequalities, precarities and vulnerabilities, and these conditions were significant in shaping the pandemic outcomes. Losses of jobs and hours were not felt evenly across all demographic groups and the pandemic has shown the **need for major, perhaps revolutionary, changes in how the cultural sector views work and the workforce**. The pandemic held a mirror up to a deeply unequal cultural sector.

Our research highlighted how networks played a key role in supporting the cultural sector through the crisis and 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** illustrated in our case studies. Accordingly, our ecosystem analysis of Greater Manchester illustrated how **cross-sector collaboration** enabled organisations to network with each other and associated freelancer communities, and to support independent artists with fundraising support, advisory sessions, bursaries, and commissions.

**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, and are mindful of the UK’s drive towards net zero by 2050. Collectively, these issues are likely to negatively impact rural and peripheral areas so the sector will have to work closely with funders and policymakers to ensure that communities in all parts of the country are able to engage with the full richness of the UK’s cultural offer.

As indicated by our 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 placing it at a distance in public space. **The importance of the cultural and creative sectors to animate and stimulate night-time economies and town and city centre high streets was keenly felt**, and cultural investment was made a key priority for the first round of “Levelling Up” funds and in many locally led recovery plans.

Our audience research has indicated that **digital distribution is not the great equaliser or diversifier that much of the sector was hoping 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. **Digital innovation can make a positive difference, but only when embedded in a long-term strategy of audience and school engagement.**

**The UK’s cultural sector is undoubtedly at an inflection point and facing imminent burnout alongside significant skills and workforce**

**gaps. It therefore urgently needs to adopt regenerative modes of working.** A regenerative approach would carve out time for all of the positive initiatives that we witnessed across the cultural sector during the pandemic: revisioning and re-strategising, professional and network development, reflection and evaluation, play and innovation. But regenerative models involve sacrifices: less producing and production, less product and income, less hidden labour and overworking, less solipsism and introspection. This vision can only be realised if the cultural sector keeps working together as a joined-up ecosystem and doesn’t rupture at the seams.

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## Photo captions and credits

p 2: The Lowry in lockdown.  
**Photo: Nathan Chandler**

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