COVID-19 Scottish Creative Sectors Survey

Summary Report

Introduction

1. Creative Scotland's survey of the Scottish creative sectors asked about the impact of the COVID-19 pandemic since March 2020 and ongoing challenges for 2021. The survey was open for responses from organisations working in the arts, screen and creative industries, including creative businesses, and from individual artists, creative practitioners and freelancers. The survey was taken between 3rd December 2020 and 8th January 2021. We received 606 survey responses from 181 organisations and 435 individuals.

2. Respondents work in a range of art forms and specialisms, and many were working across a range of creative areas:

    - Over half of responding organisations worked in Music (53%) and 38% in Theatre.
    - For individuals, Visual Arts (25%), Music (24%) and Film and Broadcast (24%) were the most prevalent artforms or specialisms.
    - Half (50%) of responding organisations operate public venues and 22% are Creative Scotland Regularly Funded Organisations (RFOs)
    - Respondents were based in all 32 of Scotland's 32 Local Authority areas with the highest percentage of responses from Glasgow and Edinburgh.

    The full profile of survey respondents is shown at **Appendix 1**.

COVID-19 Impact

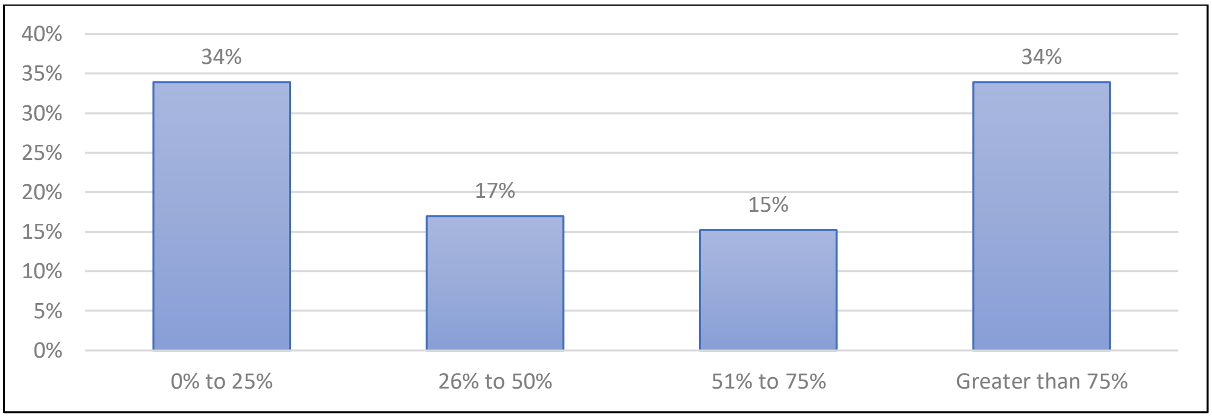
3. Respondents were asked to provide an estimate of their loss in income in 2020 as a result of COVID-19. We asked for these figures to account for any reductions in expenditure (e.g. reduced venue energy costs) or funds received as part of COVID-19 support schemes.

    - The 168 organisations responding to this question estimated total losses of £58m, representing an average loss of £345,199 per organisation
    - The 362 individuals responding to this question estimated losses of £5.5m, representing an average loss of £15,209

It is important to note that the survey was open to anyone who wanted to participate and anonymous and there is therefore no way to be sure that these losses are representative of the sector as a whole. It is clear, however, that reduced expenditure and emergency funding have not been sufficient to offset substantial losses for both individuals and organisations.

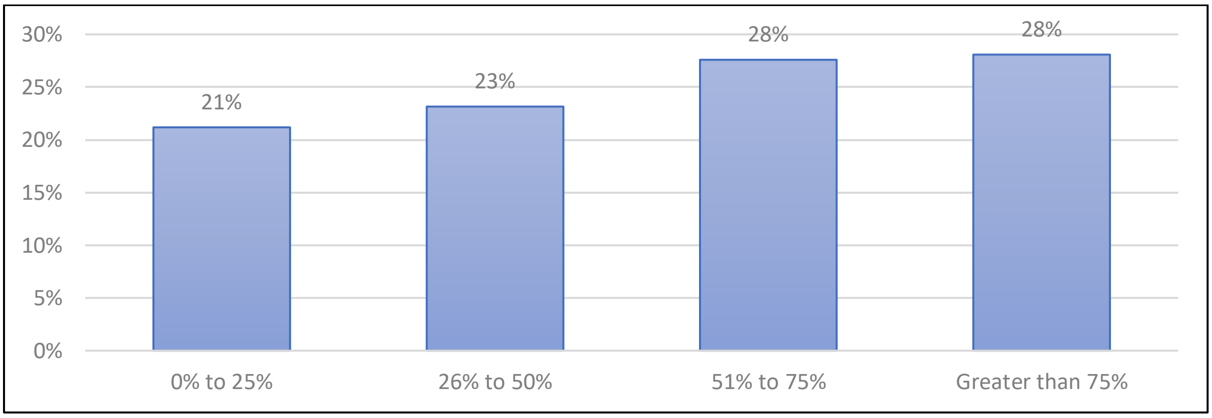
4. Respondents were asked what proportion of their projected income for 2020 these losses were. Half (49%) of organisations and 56% of individuals stated that estimated losses made-up more than 50% of their projected income for 2020 (**Figure 1** and **Figure 2**).

Figure 1: If known, what proportion are these losses of your projected income for 2020? (Organisations)



n=171 (asked of organisations only)

Figure 2: If known, what proportion are these losses of your projected income for 2020? (Individuals)



n=406 (asked of individuals only)

5. Organisations were also asked about cash reserves utilised as a result of COVID-19 losses. More than two-thirds (70%) had used business cash reserves, with a third (33%) having used more than 75% of cash reserves (**Figure 3**).

Figure 3: Have you used business cash reserves in this financial year because of COVID-19?

Response	%
Yes, up to 25% of cash reserves	16%
Yes, between 26% to 50% of cash reserves	11%
Yes, between 51% to 75% of cash reserves	11%
Yes, more than 75% of cash reserves	33%
No	30%

n=179 (asked of organisations only)

6. Organisations were asked how many staff they had placed on furlough, that had returned from furlough, had been deemed ineligible for furlough or had been made redundant. **Figure 4** shows the breakdown across the 181 organisations that responded, showing that high numbers remain furloughed.

Figure 4: As a result of COVID-19 in 2020 how many employees have...?

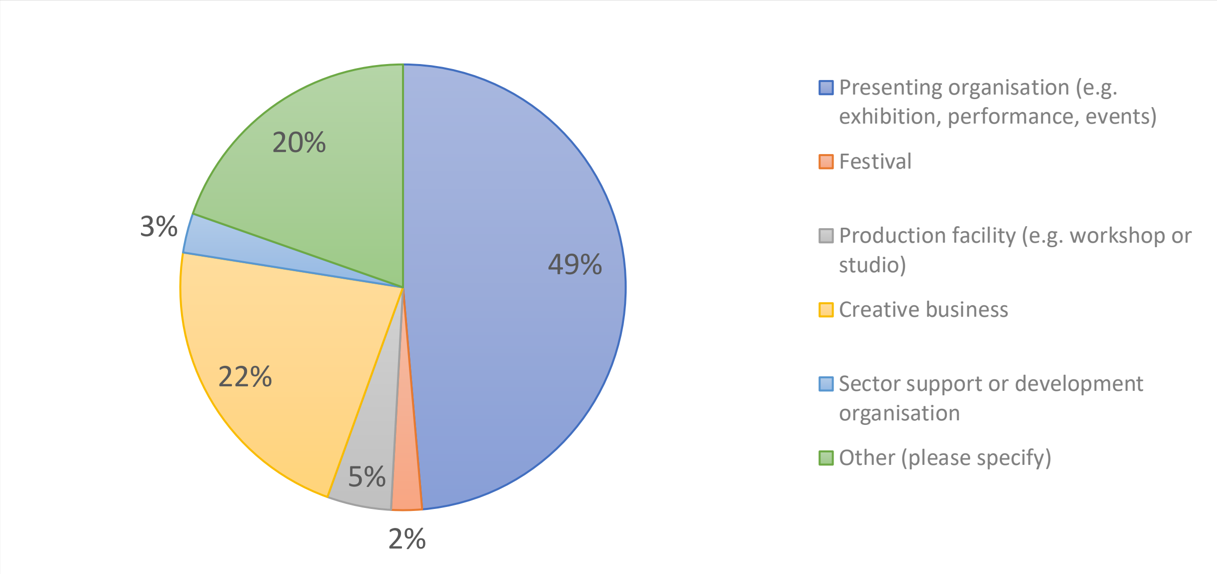
Response	Number of staff (FTE)
Been furloughed, using the Job Retention Scheme	1,797
Been brought back from furlough (to date)	530
Been deemed ineligible for furlough	244
Been made redundant	269
Total	**2,839**

n=181 (asked of organisations only)

7. Further analysis shows that half of the 269 redundancies relate to presenting organisations, for example those putting on exhibitions, performances and events **(Figure 5)**. Furthermore, 84% of redundancies were made by organisations that operate a public venue. A quarter (25%) are linked to organisations operating in the Music sector and 11% in the Theatre sector[1], although these art forms are more heavily represented in the survey responses.

[1] The range is 0-9% for all other artform or specialism areas

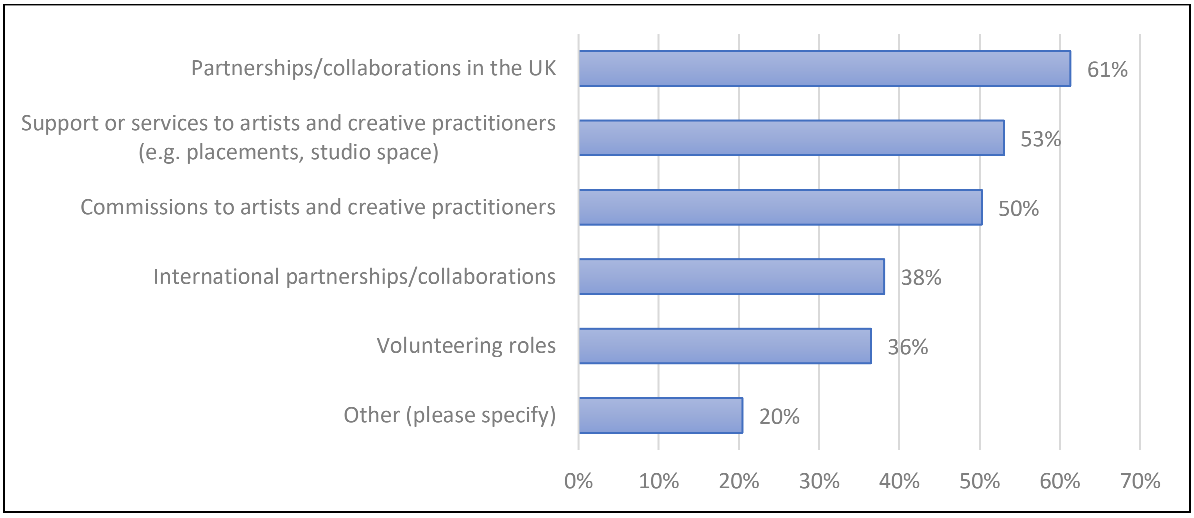
Figure 5: Staff Made Redundant by Organisation Type (%)



8. Organisations were asked about a range of potential opportunities that may have been lost as a result of the COVID-19 pandemic **(Figure 6)**.

    - 61% of organisations reported losing out on UK partnerships or collaborations and 38% on international partnerships or collaborations
    - Over half (53%) were unable to offer support or services to artists and creative practitioners (e.g., placements, studio space), half (50%) had been unable to offer commissions, and 36% were unable to offer volunteering roles
    - A fifth of responding organisations identified other lost opportunities, which included: the loss of event bookings (e.g. for concerts, festivals and exhibitions etc.); being unable to undertake community based or school-based work; and lost development opportunities for creative practitioners, such as apprenticeships.

Figure 6: Have you lost any of the following opportunities as a result of COVID-19? (Organisations)

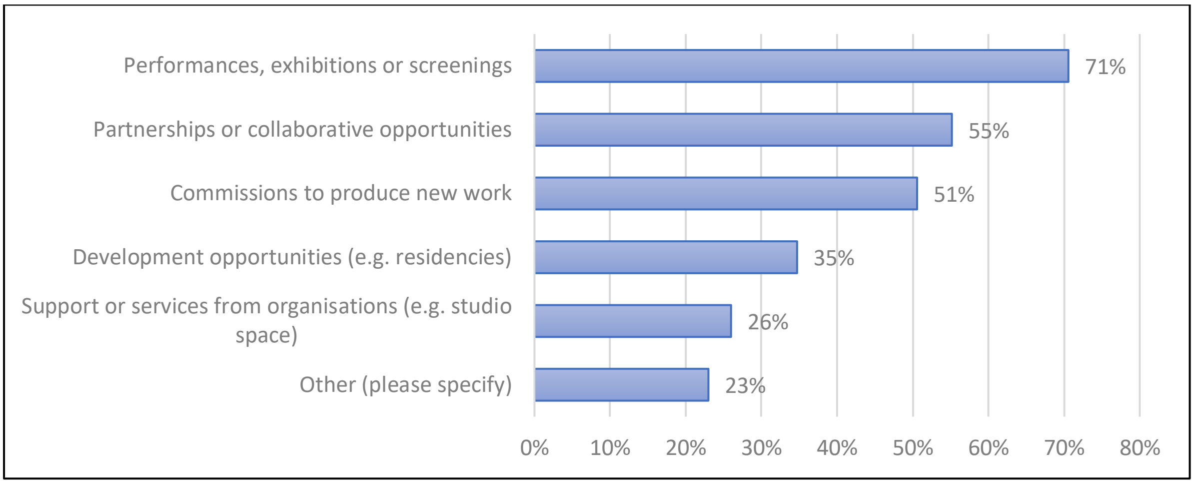


n=181 (asked of organisations only)

9. Individuals were asked a similar question about lost opportunities **(Figure 7)**:

- 71% reported that they had been unable to deliver planned performances, exhibitions, or screenings
- Over half (55%) lost out on partnerships or collaborative opportunities and 51% lost out on commissions to produce work
- Over a third (36%) had lost out on development opportunities such as residencies and a quarter (26%) on support or services from organisations, such as studio space.
- 23% of responding individuals identified other lost opportunities which included: lost teaching opportunities, loss of community or school-based work, loss of contracted work (e.g. projects, events, and filming) and loss of sales.

Figure 7: Have you lost any of the following opportunities as a result of COVID-19? (Individuals)



n= 435 (asked of individuals only)

10. Most responding organisations were aware of COVID-19 related support available to the creative sectors, individuals and creative practitioners offered during lockdown (88%), although awareness was comparatively lower for those based outside urban centres[2]:

- 140 organisations provided details of COVID-19 support funds they had received, as shown in **Figure 8**. In total responding organisations had received £17m in support, including £7.6m of Creative Scotland funding, £4.8m from UK Government initiatives and £1.4m from other Scotland specific funds. 41 organisations noted that they had not/not yet received support funding.
- A high number of organisations reported funding support from other sources, which included: the Corra Foundation; PRS Foundation; Help Musicians UK; Musicians Union; Youthlink; YTAS; and Art Fund.
- Over 90% of organisations identifying as production facilities (e.g. workshop or studios) reported being successful in receiving COVID-19 support, while 63% of festivals reporting they had been successful in receiving support.

[2] *Aberdeen, Dundee, City of Edinburgh and Glasgow local authorities*

Figure 8: Have you received COVID-19 support for the creative sectors? (Organisations)

Answer Choices	Total Number (£)
Creative Scotland (e.g. Cultural Organisation and Venues Recovery Fund)	7,590,765
UK Government initiatives (e.g. Bounce Back Loans)	4,761,653
Other Scotland-specific Funds (e.g. Event Scotland, Pivotal Enterprise Resilience Fund)	1,429,532
Funding from Trusts and Foundations	726,555
Creative Scotland Youth Arts funds	199,537
Other	2,291,778
Total	**16,999,820**

n=181, of which140 provided financial data (asked of organisations only)

11. Individuals were asked a similar set of questions about emergency support. Again, most were aware of COVID-19 related support (84%), although awareness was comparatively lower for those based outside urban centres:

    - 368 individuals provided detail on the COVID-19 support they received, as shown in **Figure 9**. In total responding individuals had received £1.8m in support funding, including £785k of Creative Scotland funding, £761k from UK Government initiatives and £163k from other Scotland specific funds. 67 noted that they have not received or have not yet received financial support.
    - Individuals reported over £35k of funding support from other sources, which included: Authors Foundation; BECTU; FST; Equity Hardship Fund; Help Musicians UK; Musicians Union; Netflix Fund; One Dance UK; PRS Foundation; Scottish Games Network; and the Society of Authors.

Figure 9: Have you received COVID-19 support for the creative sectors? (Individuals)

Answer Choices	Value (£)
Creative Scotland (e.g. Bursary or Hardship Funds):	785,380
UK Government initiatives (e.g. Self-Employed Income Support Scheme):	761,461
Other Scotland-specific funds (e.g. Event Scotland, local authorities):	163,486
Funding from Trusts and Foundations:	59,632
Other:	35,231
Total	**1,805,190**

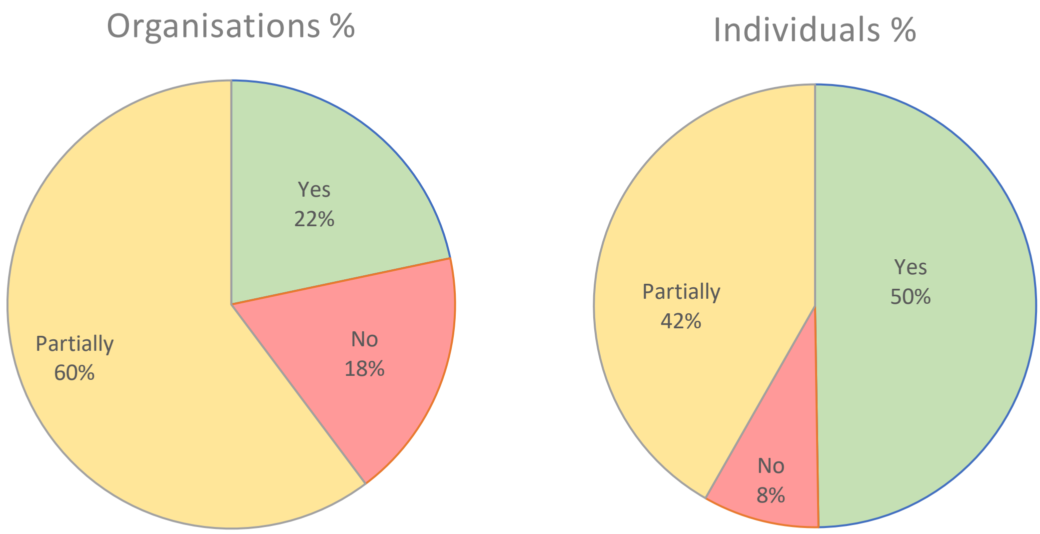
n=435 (asked of individuals only)

Current operating environment

12. The survey asked about the current operating environment in the sector **(Figure 10)**:

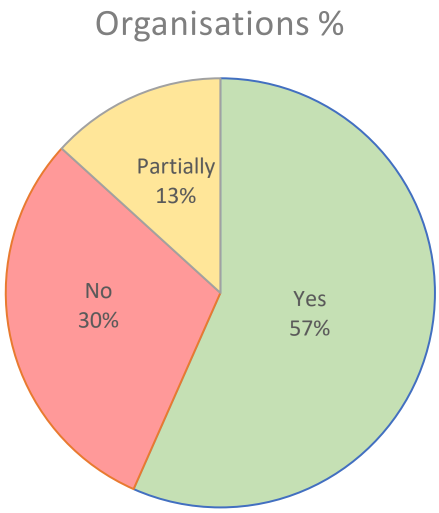
- Less than a quarter (22%) of responding organisations report that they have been able to continue operating fully since COVID-19 restrictions have been in place. The majority (60%) have been able to operate partially and 18% have not being operating at all.
- 31% of organisations that operate public venues stated that they have been unable to operate at all with restrictions in place, with the proportion lower (8%) for those that do not operate venue
- A higher number of individuals (50%) report being able to continue their work as artists, creative practitioners, or freelancers while COVID-19 restrictions have been in place, and a further 42% have been able to operate 'partially'. However, 90% of individuals based in more rural settings stated that they were able to continue working as an artist or creative practitioner compared to 53% in urban centres

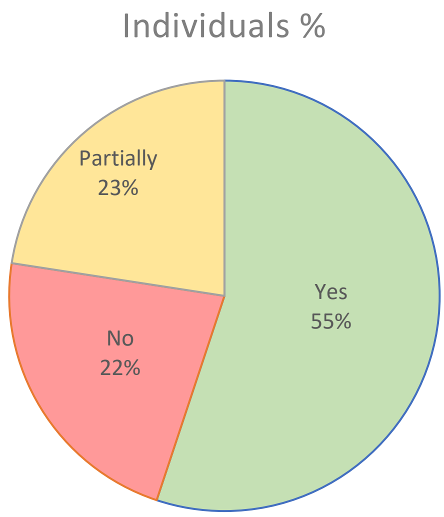
Figure 10: Have you continued to operate while COVID-19 restrictions have been in place?'



13. Despite COVID-19 restrictions, most organisations (57%) and individuals (55%) have been able to present work online or undertake activity digitally (**Figure 11**).

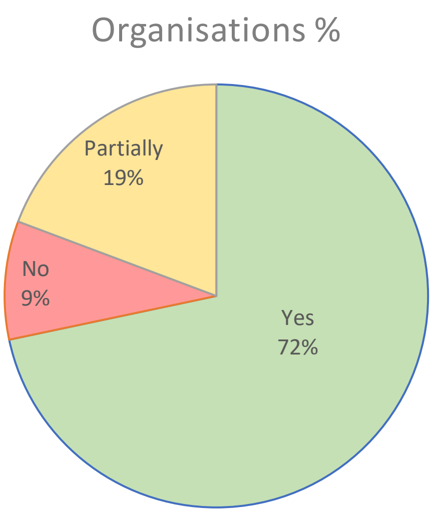
Figure 11: Have you been able to present work online or undertake activity digitally while COVID-19 restrictions have been in place?'

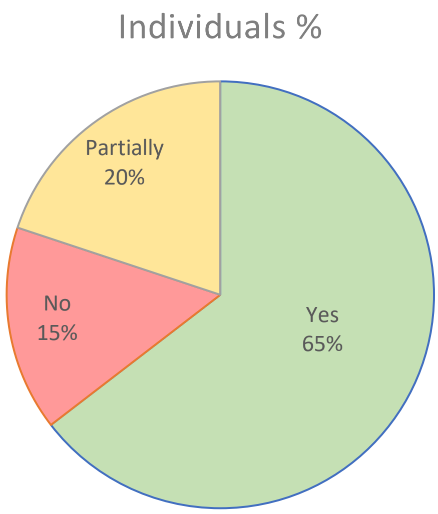




14. Over two-thirds of both organisations and individuals have been able to continue working on development and planning with COVID-19 restrictions in place. A further fifth of both groups (20% and 19% respectively) have continued to work on these in part. (**Figure 12**). Smaller proportions of respondents - 9% of organisations and 16% of individuals – have not been able to continue development and planning work.

Figure 12: Have you continued to work on development and planning while COVID-19 restrictions have been in place?





15. Organisations were specifically asked if they have been able to deliver physically distanced activities since COVID-19 restrictions have been in place. 45% have been

unable to do so, 28% have been able to partially deliver physically distanced activities and 27% have been able to fully deliver physically distanced activities.

16. In terms of operational measures taken in response to the challenges of the COVID-19 pandemic, 77% or organisations had moved face-to-face meetings online and 60% had asked staff to work from home. Just under half had cancelled or delayed any future recruitment plans, introduced changes to staff working patterns or had made temporary changes to staff hours or terms of employment (**Figure 13**).

Figure 13: What measures have you taken to mitigate the impact of COVID-19 on your activity?

Measures	%
Moved face-to-face meetings online	77%
Asked employees to work from home	60%
Cancelled or delayed any future recruitment plans	47%
Introduced changes to staff working patterns	46%
Made temporary changes to staff hours or terms of employment	43%
Redesigned office space to implement social distancing	35%
Introduced a no-travel policy for work	26%
Implemented staff pay cuts	16%
Made permanent changes to staff hours or terms of employment	14%
Other (please specify)	17%

n= 166 (asked of organisations only)

17. Nearly two-thirds (64%) of individuals reported that they are experiencing additional health and wellbeing challenges arising from working from home. A lower proportion (43%) of organisations reported that their employees are experiencing additional health and wellbeing challenges arising from working from home.

18. Respondents were asked what measures they have taken to mitigate the impact of COVID-19 on their activity. Approximately one-third of organisations referenced pivoting work to digital during the pandemic. Many noted various hygiene measures, social distancing, staff working from home and other methods of reducing the impact of the virus. Other measures include cancelling or postponing work, staffing (redundancy/furlough), applying for funding/fundraising and taking action to reducing costs.

What measures have you taken to mitigate the impact of COVID-19 on your activity?

"Pivoted online as much as possible. Established new streaming partnership and new platform."
"We have tried to diversify in order to keep the business sustainable and keep the skill base we have."
"Full COVID risk-assessment carried out and new measures implemented: social distancing; one-way systems, additional cleaning, plastic screens, signing in for all visitors, etc".
"reduced capacity, limited services, extreme deep cleaning of venue & hire equipment. "
"Suspended all planned rehearsals and concerts from mid-March 2020 until further notice."
"Cancelled all activity and cut all spending "
"Vastly reduced expenditure, postponed projects that could not be undertaken safely/affordably, implemented very strict COVID-safety protocols"
"Reducing costs, making redundancies, exploring new income sources"
"Reduce all outgoing costs to be able to survive. Made almost all staff redundant…"

19. In response to the same question, more than half of individuals stated that they are pivoting work in some way, for example working online or doing development activity at home. Over 15% of respondents stated that they had found or are applying for alternative work. Applying for funding support, following government guidelines, reducing costs, and cancelling work were other actions cited by individuals.

What measures have you taken to mitigate the impact of COVID-19 on your activity?

"All PPE and social distancing put in place, online exhibitions"
"I've focused entirely on projects for which I can create material at home"
"Tried to increase online presence, visibility & marketing"
"Trained in a new discipline and also sought work in other departments"
"finding other employment"
"Keep applying for other work"
"I am constantly applying for opportunities and trying to plan ahead for next year, although this feels nearly impossible as I work with live performance. I keep creating and working on creative projects even though this is not paid for or for a specific presentational outcome"

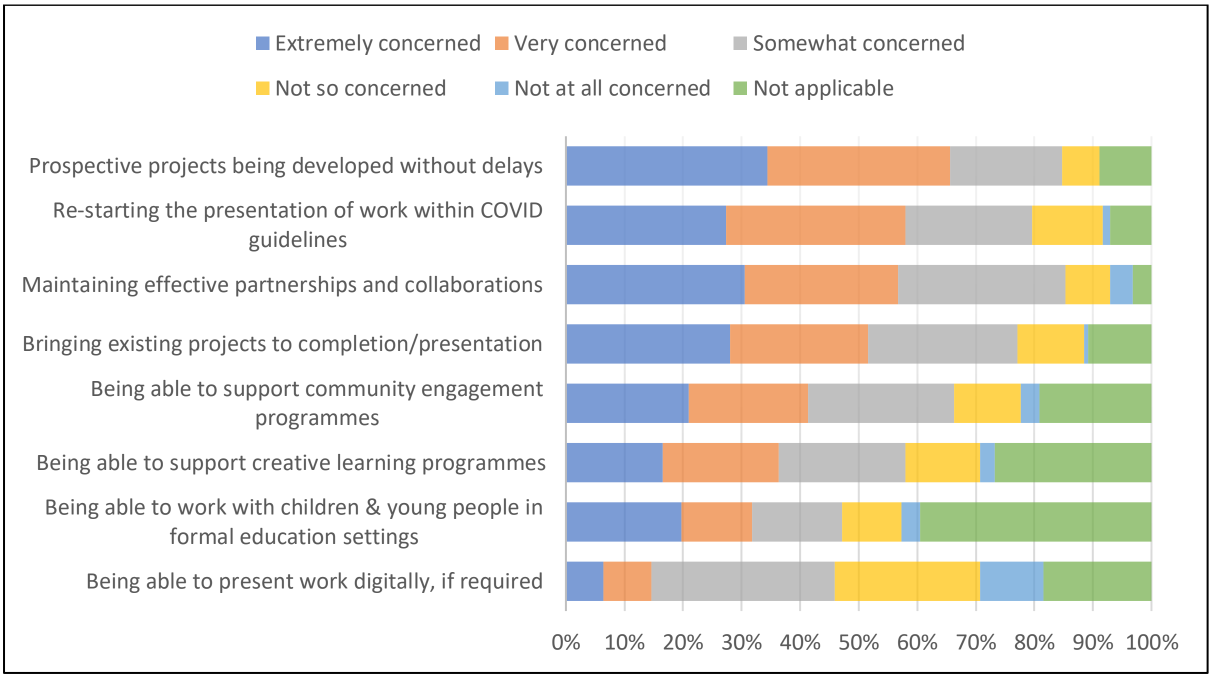
"Proactively doing more creative work even if it means it is for free - other businesses are also struggling so I believe I am contributing to a supportive community by helping others with their design work. "
"Delaying touring, building in long lead times to projects."

Future Challenges

20. The final section of the survey asked respondents about their level of concerns about a range of challenges, as we moved in 2021. Organisations were asked about their concerns about meeting priorities **(Figure 14)**:

- 85% of organisations respondents were concerned (somewhat, very, or extremely) about prospective projects being developed without delays and maintaining effective partnerships and collaborations
- 80% were concerned about re-starting the presentation of work within COVID guidelines
- 77% were concerned about bringing existing projects to completion/presentation

Figure 14: How concerned are you about the following in terms of meeting your priorities? (Organisations)

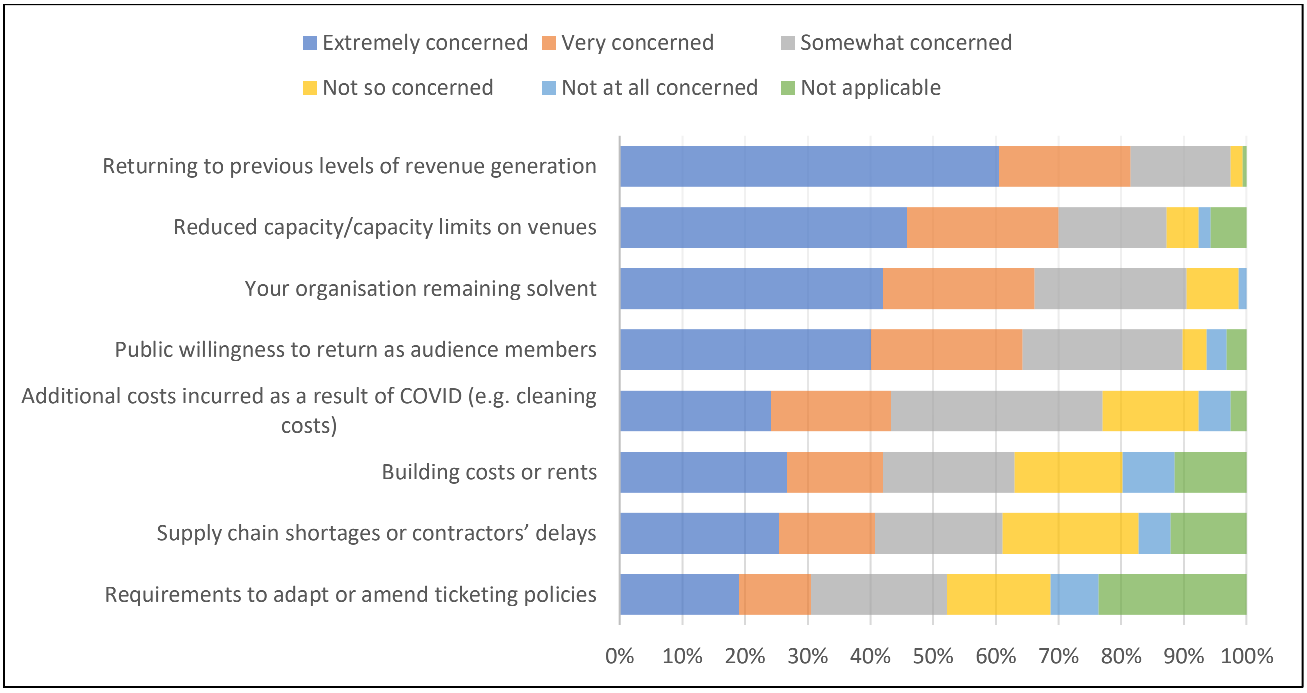


n=157 (asked of organisations only)

21. When asked about business sustainability, the greatest concerns for organisations are returning to previous levels of revenue generation **(Figure 15)**:

- 97% are concerned (somewhat, very, or extremely) about returning to previous levels of revenue generation
- 90% are concerned about their organisation remaining solvent and about public willingness to return as audience members

Figure 15: How concerned are you about the following in terms of business sustainability?' (Organisations)

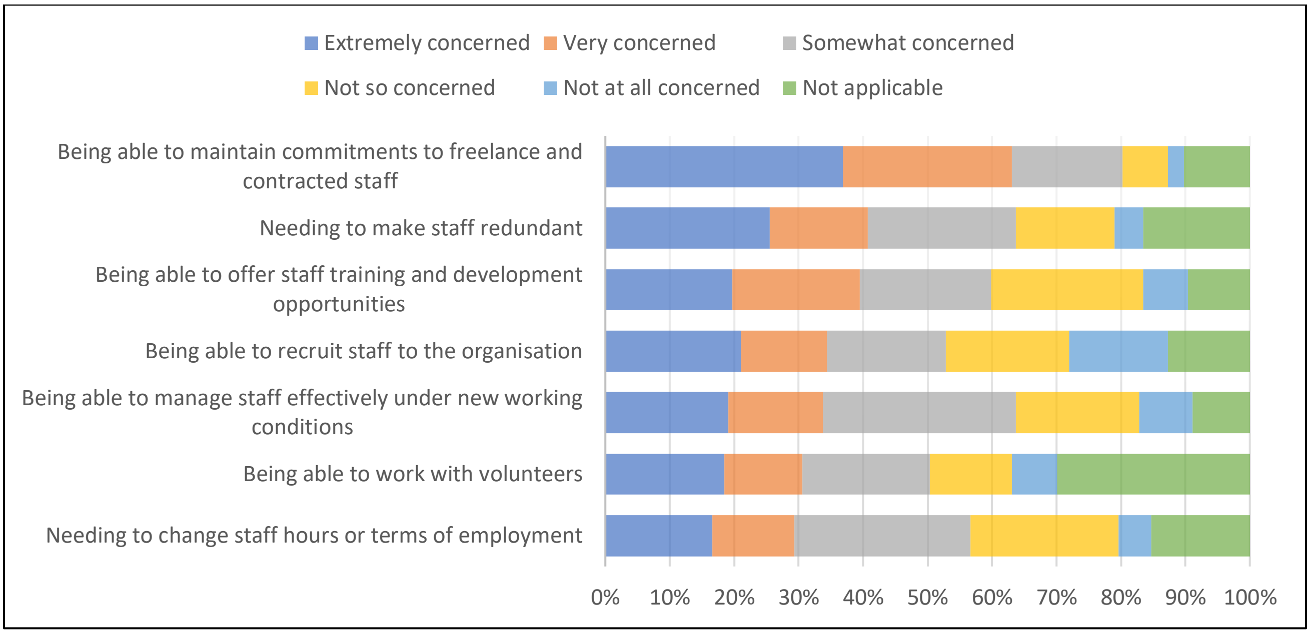


n=157 (asked of organisations only)

22. We also asked organisations about future staffing concerns **(Figure 16)**:

- Most were concerned about being able to maintain commitments to freelance and contracted staff (80% are somewhat, very, or extremely concerned)
- 64% reported being concerned about needing to make staff redundant and being able to manage staff effectively under new working conditions

Figure 16: 'How concerned are you about the following in terms of staffing? (Organisations)

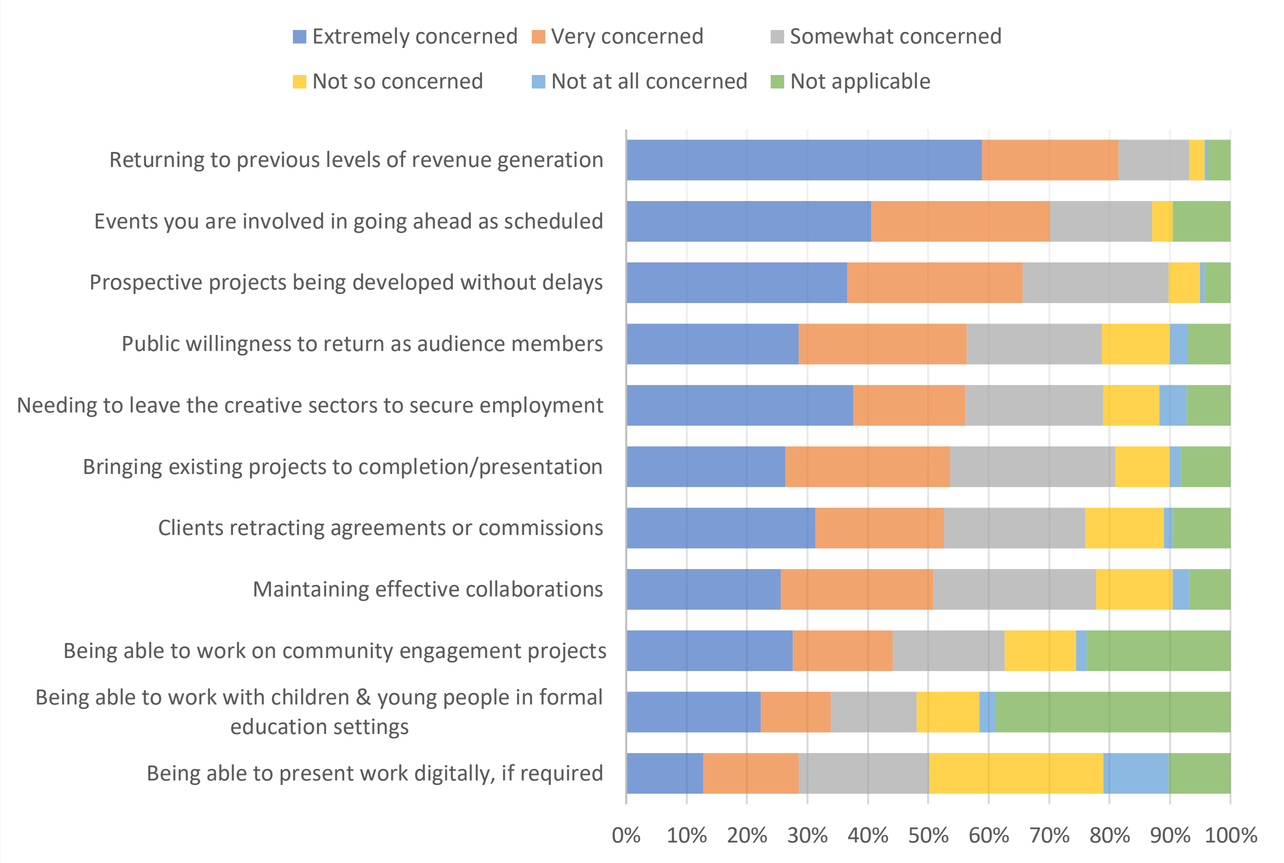


n=157 (asked of organisations only)

23. Individuals noted concerns across a range of challenges for the future **(Figure 17)**:

- 93% are concerned (somewhat, very, or extremely) about returning to previous levels of revenue generation
- 90% are concerned about prospective projects being developed without delays
- Notable levels of concern were also raised about events going ahead as scheduled (87%) and bringing existing projects to completion/presentation (81%)

Figure 17: In the coming year, how concerned are you about the following? (Individuals)



n=399 (asked of individuals only)

24. In open text responses, over a third of individual respondents referenced finances and income as the biggest challenge for 2021. Job security, lack of opportunities, health (mental and physical), uncertainty, difficulty in planning, the prospect of future lockdowns and concerns about when audiences will return were other key themes raised by individuals.

What are the biggest concerns and challenges you are facing in the coming year?

"It feels like that there's no end to this situation. Being able to perform to a live audience is critical for me as an artist and on a personal human level"
"Financial insecurity. I have no income, a family to support and fear I will lose my home"
"What the return to live performance looks like"
"Planning; Reaching audiences; confidence and willingness of audiences to return to theatres and venues"
"Prolonged lockdown. I need exhibitions to generate publicity and drive sales"
"That the industry is actually gone. Not damaged but non-existent"

"That opportunities I have applied and that have been funded will not take place"
"Mental health concerns from Lock down and restrictions. Concerns for creating work in an industry which has significantly reduced its activity, and which was already competitive at the best of times."

25. For organisations, concerns about finances and income present the greatest challenges for the coming year. Uncertainty around re-opening dates and audience intentions are also of significant concern.

What are the biggest concerns and challenges you are facing in the coming year?

"A we don't know how the virus is going to progress or what will happen this coming year, it is difficult to plan dates (even rough dates)… Without an end date in sight for this, we don't know how much of our funding we should reserve for ongoing overhead costs…"
"When will we be allowed to re-open, will the business survive?"
"No performances going ahead due to social distancing therefore making our income much lower but still having similar expenditure as 2019"
"Without live music events and with reduced numbers and maybe without financial help we would struggle to keep open"
"lack of clear timeline makes any planning for live events difficult…"
"We still have no indication of when we can reopen and what facilities will be available when we can…"

26. When asked what change would make the biggest difference to their ability to operate effectively in the coming year, organisations cited: clarity of guidance; successful vaccine rollout; lifting of COVID-19 restrictions; funding support; the return of audiences; and events and venues.

What change would make the biggest difference to your ability to operate effectively in the coming year?

"To have a clear date in mind for when we are likely to reopen. Or failing that, to have advance notice for when we can reopen venues. To know at what stage social distancing will end (i.e., is it when everyone over aged 50 and/ or with underlying health conditions is vaccinated?)"
"Consistent recovery funding as the restrictions continue"
"Roll out of the vaccine and audience confidence"

"A clear plan and timeline around the return of events. Financial support beyond March, as it looks extremely unlikely anything will have changed by then"
"For audiences to be allowed back into venues"

27. The responses from individuals broadly followed the same themes, although respondents also noted the possibility of a Universal Basic Income.

What change would make the biggest difference to your ability to operate effectively in the coming year?

"Even greater financial support for self-employed artists during periods of lockdown. Introduction of Universal Basic Income. Art spaces beginning to open again (perhaps in the Summer of 2021?)"
"Introduction of universal basic income. A commitment from government to support creative industries in months and years to come so we can recover from this"
"Lockdowns and tier systems being removed to allow live performance again. (Only when safe of course)"

28. All respondents were asked in what way they feel existing COVID-19 support has been most effective for the creative sectors. Many responses cited that financial support had allowed organisations to stay solvent and provided some financial stability for those that received funding. However, multiple responses note that there has not been enough support with some reporting that they have received no financial support.

In what way do you feel existing COVID-19 support has been the most effective for the creative sectors?

"As I was unable to apply for self-employment income, Creative Scotland's hardship fund saved my life. I was close to the edge, so I appreciate the support very much"
"I don't feel it has been effective at all as I feel that the people and organisations who are in desperate need of support are not getting it. Newly established organisations and freelancers are being missed completely"
"ineffective in reaching the independent non-venue sector"
"…covering staff costs and maintaining jobs"
"It has stopped us from running out of cash"
"Direct funding has felt the most effective, but this is a short-term patch on a bigger problem"

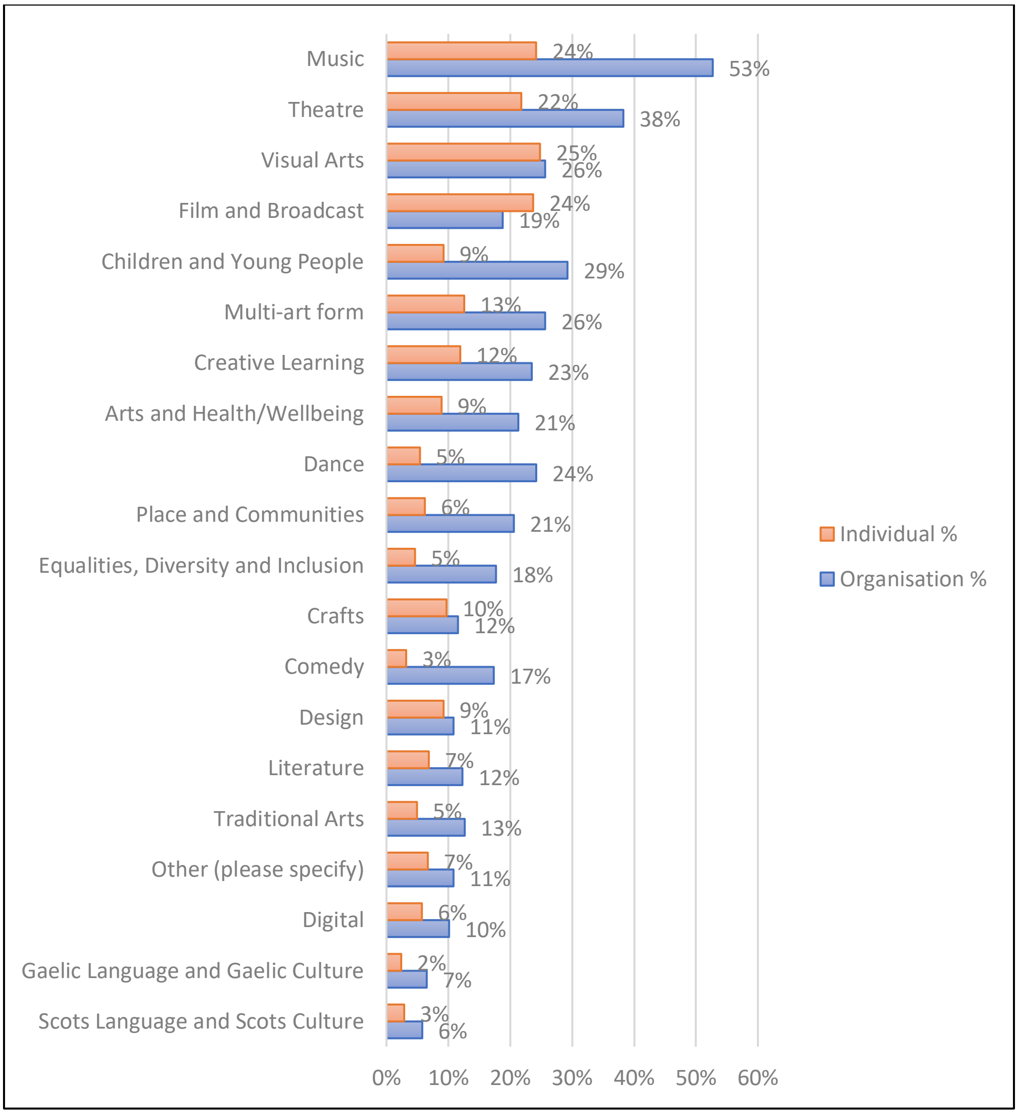
29. Respondents were also asked *what* public bodies could do to support their plans for recovery and renewal. Responses for organisations and individuals were varied but there were several suggestions for more and increased funding support, lobbying for Universal Basic Income and clear guidance and planning for the sector re-opening.

In what way do you feel existing COVID-19 support has been the most effective for the creative sectors?

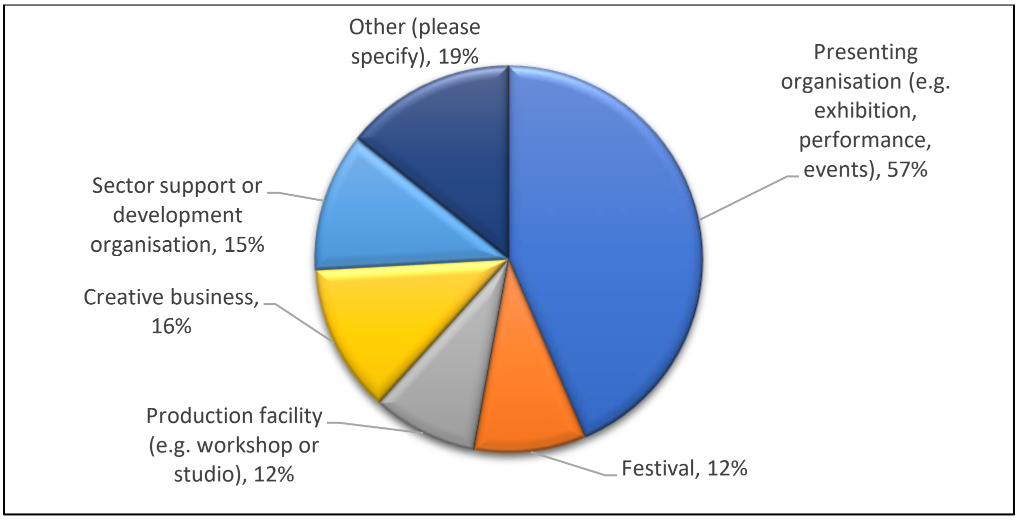
"Further streamline funding processes and demands"
"Extend funding application deadlines…"
"Subsidise lost revenue if shows have to be operated at reduced capacities"
"Funding is key, however in the arts education sector, ongoing dialogue with Education Scotland, Creative Scotland, Local Authorities and arts organisations would help to bring back confidence in the sector"
"Be clearer about eligibility"
"Provide a clear roadmap for recovery and further financial help…"
"Planning guidelines for reopening arts and culture - to give perspective, focus and hope beyond the current situation"
"Introduce a universal basic income for artists."
"Continue to value the place of the arts in society."

Appendix 1: Respondent Profile

Respondent Artform or Specialism (%)



Organisation Types (%)



Respondent Location (%)