

COVID-19 Sector Survey

Summary narrative

Following the introduction of COVID-19 restrictions in March 2020, the impact on Scotland's creative sectors has been severe. Alongside our emergency funding programmes Creative Scotland has undertaken and commissioned a range of research to gauge the scale and pattern of these impacts for those working in the sector as well as the views of the public as participants and audience members. This work supports discussions with Scottish Government and partners on the scale and nature of support which may be required in the future.

Our sector 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. It opened in early December and was intended to give a picture of the ongoing challenges facing the sector as we moved into 2021. While it was live, Scotland tightened protections against COVID-19 to prevent the spread of the new strain of the virus. Since late December 2020 Scotland has remained in lockdown and cultural venues have remained closed.

The survey was open to anyone who wanted to participate and anonymous, to ensure respondents felt confident in giving an honest picture of their financial position and the challenges they were facing. We received 606 survey responses, from 181 organisations and 435 individuals. Together they provide an important snapshot of the key challenges and concerns for the creative sectors.

We recognise that this is a relatively small sample of those working in the arts, screen and creative industries in Scotland - economic statistics show that there are over 15,000 creative industries enterprises in Scotland and over 7,000 individuals have applied to our COVID-19 Bridging Bursaries and Hardship funds. The findings are nevertheless indicative of the experience of those working in the sectors and covers the breadth of creative practice, with responses from a range of art form specialisms, types of organisation and from all of Scotland's 32 local authority areas. The survey also looks beyond cultural venues to organisations presenting work, sector support organisations, creative businesses and production facilities.

Respondents reported substantial financial losses as a result of COVID-19. Half of organisations and 56% of individuals stated that their losses made-up more than 50% of their projected income for 2020, estimating average losses of nearly £350,000 for organisations and over £15,000 for individuals (this accounts for reduced expenditure and any COVID-19 funding support). While we can't be sure that the scale of these losses is typical for the sector as a whole, it is clear that reduced outgoings and emergency funding have not been sufficient to offset substantial losses for both individuals and organisations. Worryingly, more than two-thirds of organisations had used business cash reserves as a result of COVID-19, and a third had used more than 75% of cash reserves.

A range of **COVID-19 related support** has been made available to the creative sectors and most survey respondents, but not all, were aware of this. Of those who had accessed emergency funding, most had done so through Creative Scotland routes, although UK Government initiatives and other

Scotland specific funds were also key sources of support. When asked what more public bodies could do to support their plans for recovery and renewal suggestions included: more and increased funding support; lobbying for Universal Basic Income; and clear guidance and planning for the sector re-opening.

Organisations report facing a range of challenges. Less than a quarter have been able to continue operating fully since COVID-19 restrictions have been in place. The majority had moved face-to-face meetings online and asked staff to work from home. They report high numbers of staff being kept on furlough, with some employees being deemed ineligible for furlough. Half of the redundancies reported relate to presenting organisations, for example those putting on exhibitions, performances and events, and the majority were made by organisations operating a public venue. 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.

High numbers of organisations report losing out on UK and international **partnerships and collaborations** and over half were unable to offer commissions or support services to artists and creative practitioners.

Although a higher number of **individuals** report being able to continue their work as artists, creative practitioners, or freelancers, over two-thirds had been unable to deliver planned performances, exhibitions, or screenings. Over half had lost out on partnerships or collaborative opportunities and commissions to produce work and, mirroring feedback from organisations, they reported missing out on opportunities such as residencies and studio space. More positively, over two-thirds of both organisations and individuals have been able to continue working on development and planning with COVID-19 restrictions in place.

Importantly, 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.

Turning to **prospects for 2021**, both organisations and individuals remain concerned about prospective projects being developed without delays, presenting work within COVID-19 guidelines and being able to maintain effective partnerships and collaborations. When asked about business sustainability, nearly all organisations are concerned about returning to previous levels of revenue generation, prospects of remaining solvent and about public willingness to return as audience members. Most were concerned about being able to maintain commitments to freelance and contracted staff, the possibility of making staff redundant and being able to manage staff effectively under new working conditions.

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 the opening of venues and events. Responses from individuals broadly followed the same themes, although respondents again noted support for a Universal Basic Income.