Covid-19 and the global cultural and creative sector

What have we learned so far?

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Contents

Foreword

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We are delighted to be able to co-publish this significant research report by Anthony Sargent. When the Covid-19 crisis struck in March 2020, we knew at the [Centre for Cultural Value](#) that we'd have to work hard to really understand the impacts of the pandemic on the cultural sector if we were ever going to be able to achieve our mission of developing a shared understanding of the differences that arts, culture, heritage and screen make to people's lives and to society. As this report emphasises, the pandemic has impacted the cultural and creative industries more globally and traumatically than any other crisis in living memory. This means that our work is taking place in a very different context from the one we planned for back in 2018.

It is of course a truism to state that the pandemic changed everything, at least temporarily, but it is important to recognise this nonetheless. COVID-19 effected a seismic shock across the cultural sector, and we realised that our job was going to be to get under the skin of the impacts, to interview as many different people as possible, to survey the wider population and crunch the numbers to really understand the impacts as they played out rapidly and disproportionately on the cultural workforce. So we applied for a major research grant to enable us to do just that; and in the meantime, we undertook rapid reviews of [different policy responses across the UK](#) and [of how different global social security measures for cultural practitioners had enabled different governments to tailor their response to the crisis.](#)

This report complements both that early review work and [our ongoing COVID-19 research](#). It offers a truly global overview of research into the impacts and responses to the crisis all around the world. Based on a significant amount of primary and secondary research, it presents a comprehensive meta-analysis of the world's cultural and creative industries as they fared from spring 2020 to summer 2021. It provides a useful summary – highlighting, for example, the structural flaws and fragilities that characterise the cultural sector, the ubiquitous digital experimentation, and the sudden rise in social and civic engagement. But perhaps most intriguingly, it concludes with a number of insightful reflections on what might happen next in terms of research, policy and leadership. Amongst these, the report highlights the need for more research into which models and styles of leadership proved most effective through the crisis and the urgent need to develop viable ways of enabling artists and producers to monetise their online content effectively and equitably, whilst simultaneously rethinking our tired and unsustainable touring model.

As Anthony Sargent 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 positivity and creative intent that we are co-publishing this report alongside our own research. We hope that it acts not only as a definitive global account of what happened, when and where, but also as a call to action to rebuild a fairer and more sustainable cultural sector.

Introduction

Since COVID-19 was first identified in China in January 2020, declared by the WHO a Public Health Emergency of International Concern on 30th January and a Pandemic on 11th March, the cultural and creative industries have been impacted more traumatically than by any other crisis in living memory. The effects have been spread around the globe more universally than in any previous crisis, taking many different strategic, operational, financial and human forms, many of them compounding one another in the depth and breadth of the damage they caused.

Many studies around the world have set out to quantify the multiple impacts of COVID-19, the inter-relationships between the different impacts and their consequences. This is not another of those studies – partly since interim verdicts about the quantitative extent of the damage already exist amongst all those reports, and until the pandemic is substantially over it won't be possible to reach meaningful conclusions about the total metrics of long-term attrition.

This study aims to do something different. Having absorbed information from fourteen international networks and over forty countries and territories between April and July 2021, from amongst that mountain of information, data and opinion this study aims to distill first lessons for the future – for people working in the Cultural and Creative Sector (CCS) and for the governments and public agencies that support them. Mostly written in July 2021 this can only be an interim, indicative exercise. The pandemic has a long while yet to run before it is in the world's rear-view mirror, but enough thoughtful analysis has now been done that we can start to see some larger lessons for the future, and possible consequences of COVID-19. This study aims to identify the most significant of those lessons and possible consequences. I give a few specific examples, but from the ocean of fascinating analysis I have only chosen examples that feel to me to make points likely to be most important for the future. Where I make more general assertions they reflect the prevailing picture that has emerged from reviewing all the analysis. As yet some of today's interim evidence from around the world is contradictory, and I have not tried to reconcile those contradictions or to summarise the evidence in ways that conceals or obscures conflicts where they exist.

The whole of the study is distilled in the brief **Summary** section following this introduction, and suggestions for how the various analyses could be taken forward make up the **What Next?** section. Some central topics recur in different sections – where they have as much importance in different aspects of the work of the CCS. The bold sentences at the head of some paragraphs are intended to help with that kind of navigation. After the generosity with which colleagues around the world have shared material with me I am conscious of the number of

important issues I had to leave out of this brief headline study on the grounds of space. I am sure they will be comprehensively covered in other studies yet to appear.

The worldwide discontinuity in the work of cultural and creative industries has been a traumatic moment of almost incalculable loss and damage. However – 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 in their pre-pandemic form. The uniquely global scourge of COVID-19 gives us a unique chance to critique some of our deepest, most ingrained and unquestioned ideas about our cultural and creative businesses and to jettison some outdated thinking it would have been unthinkable to jettison at any other time, unleashing new kinds of imaginative creativity – of strategy and management as well as of content. This study aims to inform that process.

Summary

The catastrophic breadth and depth of the damage caused by COVID-19 reflects some attributes specific to the new virus and the pandemic it has caused. It is truly global in a way that not even the two World Wars were global. The recurrent, asynchronous waves of the disease washing around the planet, the resourcefulness of the new variants they are spawning, COVID-19's insidiously invisible asymptomatic forms and Long Covid effects and the world's haphazard approach to border controls, have together all exacerbated the effects of the virus.

It is a serious disease. SARS (2002/3) infected 8098 people and killed 774[1]. In the seven years from 2012-2019 MERS infected 2442 people and killed ca. 850[2]. COVID-19 had by the end of July 2021, nowhere near the end of the pandemic, already infected 200m people and killed 4.25m[3]. Vaccines have been produced at vertiginous, unprecedented speed, and from December 2020 to July 2021 3bn doses of 13 different vaccines had been administered across 4 platforms[4]. But those figures mask the appalling level of global vaccine inequality. Where the UAE has fully vaccinated 72% of its population and 60% in Canada, just 0.1% are fully protected in Syria and 0.7% in Nigeria[5]. As of May 2021, 80% of doses administered were in high-income and upper-middle-income countries as against just 0.4% in low-income countries, and in the whole of Africa only 2% of the population had received even one dose[6]. Conscious always of the possibility of new vaccine-resistant variants emerging from pandemic hotspots, we have still not absorbed the implications of the much-repeated truth that "no one is safe until everyone is safe"[7].

And the disease has struck us at a bad moment in our own history. In the new age of inadequately regulated social media, rampant disinformation and widespread vaccine scepticism, with the rise of 'post-truth politics[8] and fantasist movements like QAnon, our relationship to truth, to belief, and therefore critically to our understanding of risk have all been seriously compromised, at the same time as many reactions to the pandemic around the world were dangerously rooted in polarised domestic politics rather than evidence-based science.

As the seriousness of COVID-19 became apparent, the way governments across the world reacted (sometimes almost overnight) - with the often erratically and inconsistently applied lockdowns, travel bans, distancing measures, quarantine requirements, working-from-home regimes and the enforced closure of swathes of communal activity - has devastated the Creative and Cultural Sector (CCS) causing extensive organisational damage, financial collapse, business failures, and severing much essential professional connectivity. The number of

cherished cultural businesses that will not survive into the post-pandemic world will change the cultural landscape and its ecology in significant ways we cannot yet predict.

These devastating effects have also shone a harsh light on structural flaws and fragilities throughout the CCS. That is especially true in employment models, where typically a third of workers in the sector have semi-detached status as casual, contract, self-employed or freelance workers, whose losses and suffering around the world have been some of the most agonising. Even for those people whose work was not immediately so gravely threatened, every aspect of pandemic lives throughout the world became 'strange, small & stressful'[9].

But with the mysterious kinds of alchemy that crises can produce, good things have also happened. In a sector that can often be change-resistant, the pandemic compelled change. For once there could be no sacred cows. Impermeably dysfunctional professional and institutional silos were suddenly broken apart. Many CCS artists and managers, finding uncommitted time where previously there had been ceaseless work, used the discontinuity fruitfully to develop new skills, explore new possibilities. Artists around the world brought urban centres, left shuttered and deserted by the pandemic, to thrilling new kinds of improvised life.

The absence of the perpetual roar of traffic in our cities suddenly made space for a completely different kind of life, slower, more reflective, kinder, environmentally more responsive. The ecosystems that make up the sector came together in ways no one could have imagined. Traditional competitors instinctively became collaborators as self-help networks sprang up throughout our communities, inward-facing at first, then gradually more outward-facing and ambitious. Arts organisations, remembering the most people-centred elements of their core missions, turned over their staff and equipment and facilities to all kinds of social and civic generosity and community service. Everywhere we rediscovered long-forgotten kinds of empathy and human care, once again believing there is such a thing as society thirty years after UK Prime Minister Margaret Thatcher notoriously declared that no such thing existed[10].

Nowhere was the response of the CCS to the pandemic more spectacular than in the online world, where a digital journey already underway was suddenly exponentially accelerated. Deprived overnight of any possibility of connecting with live audiences and communities, whole segments of the CCS sped into new online worlds. The quality varied wildly, business models were uncertain and for many discoverability was an unsolved challenge, but the online space was suddenly alive with cultural offerings. Partnerships sprang up between major cultural players and tiny specialist digital teams, festivals joyfully united artists all over the globe, and all kinds of interactive adventures linked audiences and artists in thrilling new ways. It is fascinating to imagine how we might have reacted to the assault of COVID-19 had it happened

thirty years ago, before the dawn of the online era, but occurring when it did it transformed profoundly and irrevocably the relationship between the live and online worlds.

Desperately trying to make sense of all this tumultuous change, governments sought to manage a chaotically evolving situation, balancing multiple sources of disparate scientific advice against strident political rhetoric. Differences of national leadership were glaringly visible, either as measured, strategic and empathetic (New Zealand, Taiwan and Iceland) or myopic, sceptical and autocratic (the USA, Brasil and India). Women leaders were seen to hold many important keys in these unprecedentedly challenging times.

Amongst all this turbulence, exciting futures are now coming into view. CCS organisations who survive this harrowing time are more likely to understand their core purposes clearly; have fleet-footed unhierarchical structures, be risk-sophisticated, have culturally and psychologically safe workplaces, be digitally mature and recognise the overwhelming importance of climate-sustainability. The local/international balance will change with a greater understanding of the importance of localism. Touring may evolve beyond the manic city- and continent-hopping of recent years into different, deeper global relationships.

From this period of frantic, intense research we will have derived a much more sophisticated understanding of our audiences, our consumers and our communities. We will see clearly the need for many different kinds of capacity-building and upskilling within CCS companies, to harmonise with the new opportunities and needs of a world that may be significantly different from the pre-Covid world, pre- and post-Covid sounding ever more like distinct geological eras.

We will realise what a bad job we have often made of helping governments understand how the CCS works, what it needs but also how much it can contribute in so many different, holistic ways. It will be an essential priority to recover that ground. Government support for culture can then be relevantly structured and expressed in ways that achieve a CCS richer, more diverse and more thrillingly adventurous than the sum of its formally disparate parts. We will learn how to engage with post-lockdown communities that may differ markedly from the communities we thought we knew before the pandemic.

Above all, we must avoid slithering unthinkingly back to all the old ways of working. In the first weeks of the pandemic people assumed it would be disruptive for a short intense period, followed by a return to 'business as usual'. Then, after a few months of adjustment to the accommodations with COVID-19, people began to see elements of the new ways of working and lifestyles they wanted to retain after the pandemic. The phrase "new normal" started to reflect this wish to embed and preserve some of the learnings of the pandemic.

The time we take to shed old behaviours and embed new ones varies with the complexity of the behaviour, but psychologists believe it takes anywhere between 18 and 254 days, with an average time of 66 days[11]. For most people the period of lockdown discontinuity will have lasted 450+ days, so we should expect behaviours newly acquired during the pandemic to have a good chance of survival, but with the start of relaxation of the world's various shutdown regimes, we are now beginning to see evidence of things starting to swing back. A lazy drift amongst some government and business leaders toward the seductive familiarity of old pre-pandemic habits and ways of thinking risks ignoring the experiences and precious lessons of the last two years - as if COVID-19 had been no more than a disagreeable dream best quickly forgotten. The growing pressure in some places to 'get back to work' after the pandemic carries the insulting innuendo that work done away from the workplace has somehow not been real work – ignoring the fast-growing evidence that many people seek a post-pandemic hybrid working culture very different from the old-school pre-pandemic workplace[12].

The pandemic has been a moment of agonising loss, but also of precious, once-in-a-generation opportunity and learning. Many of the discoveries we have made in these terrible times contain jewel-like glints of new futures, new ways of working, of living, of being – constantly evolving new normals rather than any one single New Normal. Of all the tools, surveys and analysis referenced in this study, no one of them answers all the existential questions about re-opening our civic and cultural life after this unprecedentedly long closedown. But between them they will help us seize the opportunities contained, chrysalis-like, in this extraordinary, unique moment.

A complex mix of impacts

No corner of society has been immune to the assault of COVID-19, but there are specific reasons why the Creative and Cultural Sector has suffered deeper and more disabling damage than many other sectors: [13] [14] [15]

- **The cultural sector typically relies on physical congregation and social interaction** for all its production and consumption, so was particularly impacted by the continued lockdowns, physical distancing edicts and travel restrictions;

- **A larger-than-average share of jobs in the culture and creativity sectors are precarious,** informal, and/or part-time jobs – and the lack of professional status for many artists and culture professionals often limits their access to support mechanisms or safety nets that have protected people in other sectors;

- **Widespread job losses and income reductions are limiting spending on the products and services of the CCS by consumers,** reflecting the greater cuts most people make to their discretionary spending compared with their basic living necessities;

- **There has been a widespread physical impact on cities,** with vibrancy and footfall (on which many CCS organisations depend) drastically reduced in the most acute phases of the pandemic. Images of neighbourhoods around the world that boast of 'never sleeping' suddenly devoid of human life for extended periods became commonplace during lockdown;

- In many territories with undeveloped infrastructure, **the lack of access to digital technology** and online platforms has proved challenging, for both producers and consumers.

However, amongst all the different kinds of damage wrought by the pandemic there have also been more some positive outcomes.

The pandemic has magnified existing vulnerabilities of the CCS, but in many places the light it has shone on the need for structural change has been valuable, offering a compelling new imperative for democratising the arts and culture and using new technologies to expand access to culture. Many creators and performers have used the lockdown period to focus on enhancing and expanding their own skills, experimenting and developing new kinds of work before we return to physical proximity. Many local and national governments and NGOs have

facilitated distance-learning programmes during this period to help creators and others in the field redevelop and advance their skills during the hiatus. The European Union established the Creatives Unite platform[16], enabling artists and cultural workers to share resources and collaborate to find solutions to their challenges.

In the **Performing Arts**, streaming services' reach and revenues increased, many artists experimenting with new digitally enabled modes for live performances like the overnight cult success of the dazzlingly inventive Theater in Quarantine[17], and also helpfully underscoring the overdue need for governments to revise their copyright legislation and update their regulatory frameworks to the changing digital environment to enable fairer remuneration for musicians and other performing arts creators.

Visual Artists and Galleries have explored different kinds of digital exhibitions and video studio tours, offsetting some of their losses while dramatically augmenting their audience reach, but again the challenge for these artists and institutions has been monetising these shifts. And for less established artists, those without access to digital means for sales or those whose clients are now also struggling financially (particularly in developing countries) their livelihood remains vulnerable. Ensuring fair and realistic remuneration for visual artists on online platforms remains a major challenge.

Many **Heritage sites and Museums**, though physically closed, have opened virtual doors online. Many museums have greatly increased the pace of digitising their collections, enriching their approach to interpretation and organising numerous online learning experiences. These initiatives together have led to substantial increases and diversification in online usage (estimates varying from 50% to 200%) according to studies by the International Council of Museums[18] and Network of European Museum Organisations[19].

The increase in the use of **online interactive media**, accelerated during the pandemic, coupled with fast emerging technologies like virtual and augmented realities, is creating exciting new forms of cultural experience and dissemination. One intriguing trend to emerge unexpectedly from the pandemic is the sudden growth in the popularity of online magic shows[20] which have found entirely new audiences. With all these new forms have come new business models with new kinds of market potential, while also spotlighting the need to develop more sophisticated digital skills in the CCS; to ensure that artists are fairly remunerated for their work, and that digital technologies become more readily accessible to the wider community.

The pandemic has pushed many **craft and product designers** to offer their work directly to consumers through new online platforms rather than through selling galleries or shops, and

has stimulated new partnerships with major online retailers, although again pandemic-derived reductions in discretionary consumer spending have constrained designers' earned incomes.

Trying to counter the deadening effects of the pandemic on urban life, many cities have responded to the constraints of Covid by transforming their cityscapes to increase safe use of outdoor public spaces for culture and recreation and socially distanced mobility. This kind of tactical urbanism to bring life back into shuttered cities has seen expansions of pavements and bike lanes, road closures, conversion of unused parking lots into temporary public event spaces and urban parks, and loosened regulations allowing for safe engagement in outdoor café and restaurant eating. Some cities have introduced mobile or pop-up outdoor concerts, with musicians performing on moving trucks or at specific locations where residents can enjoy music from their front porches - socialising safely from a distance.

The government of **Athens** organised a mobile concert that travelled around the city, bringing moments of escapist enchantment to people immured in their homes. In **Vilnius**, Lithuania International Airport partnered with the Vilnius International Film Festival to launch 'Aerocinema', claimed to be the first airport drive-in cinema in the world. In **Bologna**, a UNESCO Creative City of Music in Italy, the MAMbo museum reconfigured its space to allow artists affected by the pandemic to inhabit and produce in the space.

However, hanging over so many of our reactions to the pandemic has been the distortion of our understanding of risk, inhibiting our ability to react rationally in assessing risk in how we live and behave and socialise. Endlessly repeated incendiary pandemic news led to our making an unconscious choice to slip into a new state of permanent Covid anxiety, influencing our widely differing degrees of readiness to be vaccinated. A mature, embedded stable virus would not need exhaustive contact tracing and contact-alert apps provided the adult population remained up to date with vaccinations configured against the latest variants. Even the high profile of the recent Oxford University study[21] into the relative risks from COVID-19 vaccines and from the disease itself, drawing on data from over 29 million vaccinated people and showing that severe outcomes are between 10x and 100x more likely from the disease than from the vaccine, has not slowed the traction of the anti-vax disinformation campaigns. This kind of infectious fear and the politicisation which has accompanied it, fanned by inadequately controlled subversive disinformation in social media, has been a worrying new phenomenon in public health messaging and disease control. Across communities and nations it has compromised our ability as society to respond with confident rationality to risk, despite the growing body of evidence about COVID-19 and its effects. This corrosive anti-truth has leaked into almost every aspect of our lives and our behaviours, starting to replace proven evidence as a basis for risk calculations by a dangerous cocktail of fear, suspicion, rumour and

international disinformation campaigns. Rarely has any book been more timely than the forthcoming behavioural study (Rationality: What It Is, Why It Seems Scarce, Why It Matters) from Steven Pinker[22], aiming to roll back the tide of unreason which has so undermined our ability to analyse risk and take decisions on the basis of defensible rationality.

One view forward

Looking at this landscape as a whole, one view of a way forward is contained in the World Bank's report 'Cities, Culture, Creativity, Leveraging culture and creativity for sustainable urban development and inclusive growth'[23] – "The ongoing COVID-19 pandemic has had a deep impact on the cultural sector, yet it has also revealed the power of cultural and creative industries as a resource for city recovery and resilience". The report asks what policies, programmes, and investments could best contribute to helping cities nurture their CCSs and enable long-term, sustainable post-Covid regeneration of their communities. Looking at a large body of international evidence, the report identifies a range of interventions and initiatives that could help communities recover from the pandemic and the resulting economic crisis, creating an enabling context to help rebuild the cultural and creative sector.

PLATFORM	SHORT-TERM ACTIONS	LONGER-TERM ACTIONS
Livability, infrastructure, and public spaces	• Reconfigure public spaces to enable safe face-to-face interaction through collaborations with local artists and creators • Offer artists and creatives access to appropriate unused or under-used public buildings for their artistic creation, housing, and/or modular/pop-up markets and cultural events • Sponsor public CCS events to allow residents to congregate safely and experience social and communal creativity	• Improve basic services, infrastructure, and access to affordable housing and workplaces throughout creative cities • Better leverage the CCS in urban development and placemaking initiatives, introducing the type of infrastructure that enables them to live and work and thrive within cities without being displaced by gentrification
Skills, talent, and innovation	Facilitate learning and experimentation for local artists and creatives in preparation for the post-Covid re-opening of their communities	• Support skills development and talent attraction, with a particular focus on catalysers within the local creative community (e.g. creator residency programs) • Create or reinforce arts education in school curricula and support other forms of knowledge and skill development, such as apprenticeship programs

Social networks, technical and financial support	• Finance public arts initiatives to support city residents socio-emotionally, seed innovation and expand audiences • Offer technical support to artists, creatives, and CCS enterprises navigating this difficult period, helping them adapt their offerings • Offer direct and/or indirect financial support (direct grants, subsidised loans, and tax deferments) to the parts of the CCS of most strategic importance to cities in a transparent, fair, efficient and effective manner	• Reform art and culture tax structures to incentivise innovation and support a greater diversity of artists and creators to live and work in cities • Support marketing and promotional campaigns that expand markets for local CCS businesses and help brand cities

| Institutions, regulations, and partnerships | • For cities with significant participation in the CCS, designate an accountable institution or team within city government to facilitate and coordinate cross-institutional recovery efforts

• Launch and/or leverage a coalition of artists and creators adapted to the needs and capacities of the city

• Work with CCS representatives to identify regulatory measures— temporary and permanent— that would enable CCS players to continue operating in the crisis period and beyond | • Launch and/or leverage a coalition or partnership to enhance the creative city – and introduce platforms that allow for evidence-based decision-making when it comes to enabling and leveraging the CCS.

• When expanding digital access, ensure approaches that guarantee inclusive equity of access and of coverage

• Introduce regulations to safeguard against gentrification in neighbourhoods undermining creative revitalisation

• Ensure legislative frameworks guaranteeing freedom of expression and artistic freedom

• Encourage and support online platforms that guarantee fair remuneration to artists and diversity of cultural contents

• Improve advocacy and policymaking for creative ecosystems, facilitating market access and expansion, addressing sustainability and monetisation challenges associated with evolving business models and regulatory regimes. Improve creator conditions and worker protections in the sector, and address issues of fragmentation |

		• Join international city networks, programs, and/or collaboration mechanisms, such as the UCCN, that leverage the power of culture and creativity
Uniqueness	• Conduct a mapping review of the urban cultural ecosystem to gain a full understanding of the city's cultural resources, including challenges and opportunities related to their safeguarding and promotion • Implement measures to protect the inclusive diversity of cultural expression, including their contents	• Develop local strategies and programs for the promotion and development of CCS businesses that support their uniqueness and their business development • Ensure participatory processes, collaborating closely with communities and individual creatives to avoid 'over-commercialisation' and 'commercial misappropriation' of intangible cultural heritage (ICH)
Digital environment	Proactively develop opportunities for training and upskilling in digital transition and digital skills development for artists and creatives	• Enhance digital connectivity, including infrastructure, access regulations, and tackling digital divides • Support efforts to improve monetisation for creatives shifting to digital mediums • Improve regulations regarding digital royalty and compensation mechanisms to address issues of fair remuneration for artists and creatives

Strategy

Cultural businesses vary in their appetite for evolution, but parts of the cultural sector have previously proved deeply resistant to change. The pandemic has had the effect of making change a compelling necessity rather than a cerebral option, and propelled cultural organisations to reassess who and what they are really for. COVID-19 has forced cultural organisations to rethink their business models fundamentally and re-address concepts of remit and relevance, resilience and risk, viability and engagement. Although some organisations will have been terminally damaged, the crisis is also fostering a precious sense of cross-sectoral collaboration and collegiality in these processes of self-assessment and re-positioning.

The conventional division of cultural ecosystems into separated sectors (for profit; non-profit; community; amateur; educationally based, with and without public sector subsidy) obscures so many potential relationships between them, and the symbiotic ways the commercial for-profit sector can connect with the wider cultural ecosystem. Already before the pandemic the non-profit cultural sector was increasingly acting as an R&D lab for commercial businesses, with public funding enabling them to take risks with creative content and ideas.

The local and the international will both remain essential parameters for performing arts planning, but the balance will change. During the pandemic CCS priorities have taken more account of sustainability and of the quality of relationships in the arts sector. Hectic mobility and touring for the sake of touring, driven by the unquenchable thirst for international recognition, visibility and acclaim, are starting to be replaced by more meaningful inter-community collaborations[24].

The value of culture and the arts to place-making around the world has stimulated many different kinds of CCS response to the pandemic. Cultural events in the public realm are animating city centres and high streets that have lost the footfall of office workers. Volunteers from cultural organisations have been engaging supportively with vulnerable citizens during lockdowns. These quickly forged social partnerships to mitigate the impact of lockdowns have the potential to lead to longer-term changes, engendering a more empathetic sense of community amongst the CCS, and a public sector which recognises and values those kinds of empathetic contributions.

With this enriched sense of localism and rootedness, the CCS has a distinctively important role to play in their cities and regions and communities during the journey to recovery from COVID-19. Cities and regions will be able to see their cultural and creative sectors and

cultural participation as powerful engines of social regeneration in their own right. Already the creative sector is recognised as an economic driver and source of innovation. In many places specialisations in the cultural and creative sectors are now evolving which will help us tackle competitive and societal challenges from more creative angles[25].

In the face of the global challenges of Covid, there is much evidence that during the past 18 months many people in the CCS have enlarged their local professional networks, and many have started consciously building stronger local practices and relationships. At the same time collaborations between localities in different countries are opening up new opportunities to develop deeper conversations, offering the possibility of long-term quality relationships with artists and specific communities in other countries.

This move has been made easier by the way the suspension of much cultural activity has allowed cultural leaders more time to reflect on their core purpose, and on the relationships and networks that will facilitate that purpose. The necessity over long periods of the pandemic to meet entirely online has enabled networks to be more easily and flexibly established and developed, for a short precious period freeing cultural leaders almost entirely from the impediments of geography and the inefficiencies and costs of travel.

After the pandemic, we must commit ourselves not to reconstruct all the long-standing dysfunctional professional silos which have necessarily been broken down during the close-down. Instead, there is a widespread desire to use this discontinuity to establish new ways of working that build on all the successes we have discovered during the pandemic, working collectively and collaboratively towards the common needs of our cultural ecosystems and of societies at large[26]. In place of the old silos, we are discovering how responsive structural flexibility can be key to creating relevance, as cultural leaders can better feel the social pulse of the community they serve, suddenly laid bare by all the challenges and privations of the pandemic.

The ravages of COVID-19 are leading many communities, urban and rural, to reconsider their growth models to become more inclusive and sustainable. During the pandemic we have seen many ways the CCS can play a powerful enabling and catalytic role in these new local visions, as collaborating partners (with the multiplying power of all their individual and collective creativity) and as major accelerators of social, societal and environmental change.[27]

Many locations hardest hit by the crisis include those with large-scale and culture-based tourism, where international travel restrictions are now forcing us to discover new models of more sustainable cultural tourism, focusing on longer stays in fewer places rather than on very high volumes of short visits. Already before the pandemic cultural tourism represented almost

40% of world tourism[28]. As the world starts recover from the pandemic, it will be important to remember how vibrant creative sectors considerably increase the attractiveness of destinations and the energy of their interaction with visitors.

But we will emerge from pandemic with a changed tourism sector, with an expected short-term drop of 60-80% in international tourists[29], and nearby tourism more likely to drive the recovery. In this new model, the experience of the tourist visit could focus less on visiting a few overcrowded and renowned remote sites, and be increasingly linked to the discovery of characterful lesser known sites spread out across a local area. These approaches point to the possibility of a more sustainable form of tourism, expanded by the growing possibility of realising at least part of the visits as virtual experiences[30].

This has also been a period when the journey of incorporating more digital techniques and technologies in the cultural sector has been massively, exponentially accelerated. Even those who had never thought of producing for the virtual world have suddenly found themselves projected into it. This COVID-19 digitisation journey has brought mixed results: from innovative and pioneering work to poorly adapted limp performances which satisfied neither audiences nor artists[31]. But this is a clock that cannot be turned back. Despite evidence of audience hunger for the return of the live arts, during the pandemic we have opened a door into a new world of live and digital hybrid creativity which can never be closed[32].

The massive digitalisation in recent months in the CCS is already creating new forms of experience and new business models with new kinds of market potential. We are seeing major breakthroughs in the deployment of state-of-the-art technologies (artificial intelligence, virtual and enriched reality and the Internet of Things) that are already building a new 'experience economy'. The new forms of digitally mediated, decentralised creative production also allow for engagement with larger and wider communities, not only as consumers but also in terms of distributed creation – a trend leading to more inclusive and innovative forms of collective production of creative content[33].

Romania's Sibiu International Theatre Festival, before Covid an entirely live experience, reports "Since the beginning of the pandemic, we have changed our list of investments, we have made investments in the digital zone, in our equipment, in our Digital Scene website and in many investments in the recording process. We have invested in people who are able to do all these things, in translations, in editing, in directors that can create both in physical and online form. We will continue these investments and all these journeys we have begun[34].

All these developments will require consistently inclusive access to high capacity, high speed digital infrastructure, requiring us to close the current gaps in digital connectivity for both the supply and demand sides of the cultural and creative sector. OECD data has identified significant regional differences in household access to broadband, with variations between metropolitan and rural regions reaching over 30% in some countries. The experience of the pandemic is greatly increasing the pressure to address those variations[35].

These online developments will all need fresh kinds of business modelling, with their own new financial architectures. The challenges of monetising online culture and of achieving global discoverability are coming into better focus now after the experience of the pandemic, but understanding those challenges is not the same as solving them. However, it is also becoming clear that some aspects of these digital developments will help in addressing previously unsolved challenges. Online culture offers universal access, not just to global audiences but also to local audiences for whom there had been barriers preventing them attending live venues.

So many of the new developments of the past year have resulted from the exploitation of digital opportunities that it will be important that cultural organisations map and evaluate the results of their digital strategies and experiments in the coming months. After the breathless improvisation of the pandemic, in planning for the future they now need to understand with forensic clarity how users engaged with these contents, rated their experience and evaluated the strengths and weaknesses of the many different online experiments[36]. We need to recognise the precious value of all the digital and online experimentation during the pandemic in terms of how it may help us underpin our post-pandemic work with more sophisticated understanding of audience and consumer behaviours.

Overall the pandemic has shown us how vulnerable our cultural communities can be, yet also how resilient. This moment of discontinuity is a compelling opportunity to ensure our business models are both agile and sustainable, our ways of working are responsible and responsive, and our outputs are relevant and impactful. The experience of this period of acute disruption tells us that the cultural enterprises most likely to weather future disruptions will be[37]:

- led with a combination of absolute clarity of purpose and fleet-footed, responsive flexibility of structure

- financially sustainable, with a constantly re-analysed awareness of risk and of response options

- psychologically and culturally safe

- digitally mature

- climate responsible

Many different, locally rooted trends in CCSs around the world are becoming clearer as the self-analytical effects of the pandemic become more developed. Arts leaders in Asia[38] are starting to develop their own sense of a new post-pandemic Asian normal, identifying five Trends to Watch:

a. **Arts made Accessible** – the proliferation of social and digital media platforms has lowered barriers to arts consumption. This has also gained more traction during the pandemic as more arts players strive toward increasing accessibility. While consumers are expected to return to physical arts events, digital arts will increasingly serve as a gateway with their own unique appeal, offering greater inclusivity.

b. **Arts for a Cause** – the connection between art and causes will become more significant than ever as younger generations look to the arts for self-expression and as a key vehicle for change. Standing up for social issues has become increasingly important to younger consumers. Their decisions are often guided by their personal values and their interest to effect and see change in the world. Artists have already started exploring new content and modes of engagement to interact with these audiences and communities. The arts will continue evolving to be not just a voice of the people but a key medium to connect with and stay relevant to audiences, particularly with young people.

c. **Asian Cultural Wave** – Asia's emerging cultural wave in entertainment and arts is redesigning the blueprint for content and engagement. Even before Covid many Asian communities have been quicker than their Western counterparts to pivot toward digital engagement, opening the doors to new forms of hybrid performance eroding the boundaries between artists and increasingly interactive consumers. As digital technologies between increasingly integral to Asian media, the region will play an important role in shaping new cultural forms. For Asian audiences the lines between global and local are blurring as streaming companies look to localisation experts to adapt international content imaginatively for local audiences.

d. **De-Linearisation of the Arts** – traditional business models of the arts have been disrupted by digital platforms and social media, removing many of the barriers between consumer and producer. This emergence of direct-to-consumer platforms

has complemented the growing desire for independent authorship. As the creative market shifts online, artists are finding they can thrive without the middle-man. Direct models will become increasingly popular, giving artists more control over their content as the arts become more defined by the creators themselves.

e. **Arts and Lifestyle** – the line between arts and entertainment is also becoming increasingly blurred. New media are emerging, subverting perceptions of what the arts can be and where they can exist. As emerging technologies like VR/AR become more mainstream, Asian consumers are warming up to virtual worlds as places to express themselves and interact with others. COVID-19 has prompted artists to re-imagine the physical experience by experimenting with the boundless virtual spaces that the new technologies offer. In future artforms will no longer be siloed. They will be continually re-defined by cross-disciplinary, cross-industry and interactive collaborations, blurring the boundaries of where the arts can exist and what the arts experience can offer.

Meanwhile a Canadian view of the strategic implications of COVID-19 for the future context in which artists will work foresees: [39]

a. Current, heightened recognition of the cultural sector as among the 'hardest hit' means there is a precious opportunity for building sector-awareness across the whole of government; not just with ministers carrying explicitly cultural responsibilities.

b. Increased urgency is being given in public funding to issues of access and eligibility for underrepresented groups, particularly IBPOC[40], and also for commercial cultural organisations.

c. Equity, Diversity & Inclusion, Reconciliation, and Climate Action response and planning among the sector have all increased both in volume and importance during the last 16 months of the pandemic.

d. Digital will become ever more integral to the creation and the distribution of the arts, but in funding and support terms in future it will likely permeate through more existing mainstream funding programmes and objectives, rather than continuing to have its own priority funding (as in the pilot and R&D programmes of the recent past).

e. Nuanced cultural diplomacy (in place of the more imperialist cultural relations approaches of the past) is of growing interest to the cultural sector, looking to leverage the sector's ability to support appropriate Governmental soft power initiatives in more subtle and therefore more effective ways.

f. Cultural workforce uncertainty: how many of the artists who have left the sector during the pandemic will return? How can we better ensure the possibility of viable, stable careers in the CCS in place of the currently precarious employment structures?

g. Taking nothing away from the success of much of the emergency support given to the CCS during the pandemic, expectations for future public sector funding must be realistic. Some cultural institutions have an unclear post-Covid funding model, and they cannot expect government subsidies at current levels. From a public administration perspective, there will unavoidably be future cuts to pay for the debts incurred by all the Covid relief programmes, and cultural organisations have to be prepared to manage in this new fiscal environment over the next 2-3 years.

h. Those who have not traditionally received funding, or are in sectors in which public sector funding is oversubscribed and have not seen a funding increase in many years, must recognise that they now have uncertain paths into future public sector support, due both to imminent cutbacks and to the longer-term political necessity to demonstrate financial restraint.

Management

The huge variety of different ways cultural organisations have responded organisationally to the pandemic has been strongly influenced by their pre-COVID characteristics. Fundamental characteristics of organisations as they were in early 2020 - missions, values, practices, relationships and assets - have shaped their responses to the pandemic[41].

However, very widely across the globe the pandemic has exposed some commonality in managerial upskilling or capacity needs in cultural organisations:

- More sophisticated processes for developing business strategy, including a mature, confident approach to analysing and managing risk

- Versatile, imaginatively entrepreneurial revenue strategies, regularly reviewed

- Sophisticated cost comprehension and skilful management of costs

- Breadth, consistency, versatility and authenticity of communications

- Compelling, evidence-based arguments for seeking public support

- Sophisticated ranges of collaborative partnerships with other cultural and creative organisations

- Comprehending, symbiotic partnerships with commercial businesses and other investors[42]

Distinct from those, the pandemic also revealed how very few cultural organisations had sufficiently tuned plans and practices for crisis management and preparedness. If there is one lesson of the pandemic above all others, it would be always to expect and plan for not just the unexpected but also the unthinkable. As Mitch Garber, Chairman of the international superbrand Cirque du Soleil memorably said as the company suffered overnight the full global onslaught of COVID-19. "No one had ever modeled what we would do if we lost 100% of our revenue."[43]

More generally, looking to the competences cultural organisations around the world themselves say they expect to need in the years beyond the pandemic, they most commonly include:

- Advanced business engineering skills

- New managerial approaches underpinned by an empathetic, enabling and less hierarchical organisational culture

- Operational flexibility, versatility and efficiency

- Audience engagement, enrichment and development beyond simple transactionalism

- Strategically articulated communications

- Proactive, well researched government relations management

- Constantly updated digital competences, and confident understanding of how technology can contribute effectively and efficiently to the achievement of business goals

- Symbiotic business partnerships

Between Europe and North America there are differences in the skills institutions perceive as the most needed in the future. Fundraising skills have (so far) been more highly prized in the US where the CCS is less supported from public funds. Audience engagement and marketing are seen as equally necessary in both territories, while European institutions more often report needing enhanced digital competences than their US counterparts[44].

The most profound management lesson of the pandemic has been the sector's structural dependence on freelance and self-employed professionals, many of whom have been left catastrophically exposed by the pandemic. An increasing number report that they have been reconsidering their careers, feeling forced to look for jobs elsewhere, potentially creating a risk that the CCS may face a severe scarcity of talent, creativity and skills just as it is emerging from the pandemic. In Europe self-employed people make up 32% of the cultural workforce compared with 14% in the economy as a whole[45]. In the UK it is estimated that 35% of all workers in the CCS are self-employed, compared with 15% across the workforce as whole, with 89% of workers in TV production being employed as freelances according to figures from BAFTA and the Creative Industries Federation[46]. The socio-economic position of freelance and self-employed professionals in the CCS was difficult long before the pandemic, but COVID-19 has now shone a glaring light on the instability and fragility of the cultural employment ecosystem.

The cultural and creative sector is structured differently from many other sectors, institutions often relying on an interconnected and interdependent network of self-employed freelancers and micro-firms to provide creative content, goods and services. This ecosystem has long been fundamental to the sector, and only now faces collapse with the sudden loss of so much CCS revenue[47]. Cultural life in many parts of the world is supported and enabled by

this diversity of small players, many of whom have seen their livelihoods fall sharply or disappear entirely, and many of them have also had difficulties in accessing Government support.

Many cultural activities are not conducted primarily for profit, and have small margins. They lack financial resilience, so a collapse of revenue quickly impacts the companies, their staff and their activities.[48] Many companies that were hit first and hardest were already in a weak position, and existing shortcomings were then accentuated, the pandemic making structural problems that had existed long before the crisis starkly visible.

In general, Governments often underestimate cultural employment in official statistics for several reasons. The discontinuous flows of freelance, part-time and casual labour so common in the CCS are often only informally mapped and so not accurately captured in government data. When estimating cultural employment, it can be difficult for governments to determine what proportion of some economic activities and occupations is genuinely cultural, so activities and occupations which are only partially cultural are often excluded from official cultural employment statistics. Many labour force surveys include only a respondent's main paid job and do not capture the secondary employment or volunteer employment, and commonly omit or greatly under-report freelance and contract workers and some of the self-employed[49].

Unsurprisingly, during the pandemic cultural organisations across the globe have reported exceptional levels of staff stress and burnout. In Canada 3% of staff reported very high levels of stress before COVID-19 compared to 31% today[50], with some of the worst effects being experienced by members of diverse communities[51]. Cultural communities' plans for recovery from the pandemic differ in many ways throughout the world, but there is a very widely shared emphasis on the importance of creating less hierarchical, more empathetic organisational cultures, in which moments of exceptional pressure and demand can be absorbed without leading to inhumane levels of staff stress. Not only is that a recognition of management's moral responsibility for the welfare of individual staff, but more generally a stressed organisation is likely to be a dysfunctional organisation.

Looking ahead to the route out of the pandemic, the international Advisory Board for the Arts (with members on six continents) identifies seven key Revival Challenges for arts organisations which echo several of the priorities in other reports: [52]

    a.   Rebuilding team cultures

    b.   Building sustainable financial futures

c. Broadening the audience base

d. Moving from digital/online to new hybrid forms

e. Re-connecting with local communities

f. Managing logistics around reopening

g. Working towards further progress in equality, diversity and inclusion - always remembering that diversity is a fact; inclusion is a choice

And the USA's National Endowment for the Arts in its Guide to Current Practices Among Arts Organisations During COVID-19 identifies its own six pandemic lessons: [53]

a. Isolation? Treat lockdown more like "quality time." Creating pods or "bubbles" of artist teams can advance safety goals, and also boost morale. Quarantining artists together who are part of a live production or establishing artist pods may seem severe, but the practice can give greater confidence to all involved. For artists, it can also help foster a sense of community and solidarity.

b. 'The doctor is in' - or should be. Identifying a public health professional or team to advise on reopening strategies can make all the difference to the success of reopening and the confidence the process gives to audiences.

c. First principles matter. They can restore a sense of shared purpose for artists, staff, partners and donors. Hearkening back to the mission and artistic vision of your organisation can lend momentum and vitality to your reopening strategy. Arts organisations that stay focused on their mission and artistic vision will play a critical role in meeting their community's need for the arts and, as a result, are more likely to secure the community support they need not only to survive but to thrive.

d. Strengthen ties with your immediate community. Aligning arts programming with local community needs is paramount, whether through indoor or outdoor programming, virtual arts engagement, or a mix of opportunities.

e. The unexpected will continue to happen. Be transparent when it does. Adapting quickly to new circumstances and information, and communicating those lessons promptly and effectively to artists/staff, board members, donors, and the public will attract greater confidence in your endeavour. Even before the pandemic struck, many arts organisations prized nimbleness and an ability to communicate frequently with staff and patrons. Today these assets take on heightened value. In reopening,

arts organisations need to consult with their staff, board, and other key stakeholders, and keep their audiences and patrons informed every step of the way.

f.   Bring that videographer along. Partnering with a media/tech organisation—or a media/tech-savvy artist—can help document your journey and find ways to reach broader audiences than you ever might have reached previously. The transition to virtual programming during the early months of the pandemic was challenging, with a learning curve of new technology and platforms just when financial constraints were making it difficult to invest in new technology. Recognising this dilemma, some arts organisations reached out to artists experienced with digital presentation formats or they partnered with teams that could bring the equipment or expertise.

Government and the pandemic

The severity, ubiquity and dizzyingly unpredictable evolution of the pandemic has made it an exceptional test of capacity for governments and leaders around the world, both as leaders of their own communities and also as leaders of the global order in a crisis when a coherently unified global approach has never been more important. At this point, probably about two thirds of the way through the world's pandemic journey, it is hard to avoid a growing sense of disappointment with the lack of a coherent connected global approach to the challenge, as the world's sovereign nations are individually tramlined by political self-interest and short-term expediency[54], and collectively the global institutions fail to provide the kind of leadership the moment critically demands[55].

It has been instructive to see which leadership styles best rose to the challenge of navigating their countries through the interconnectedly complex challenges COVID-19 has presented to every aspect of our societies and their governance. Already many people have noted the high degree of alignment between successful response to the pandemic and leadership by women[56]. Jacinda Adern in New Zealand, Tsai Ing-wen in Taiwan, Metter Frederiksen in Denmark, Katrín Jakobsdóttir in Iceland, Sanna Marin in Finland, Erna Solberg in Norway and Angela Merkel in Germany have been cited many times as leaders whose personal style and approach have succeeded both in navigating successful paths through the crisis and in bringing their people with them.

Their combination of evidence-based rationality, believably authentic empathy and a collaborative overall approach seems so far to have achieved results where more autocratic models of leadership have been less successful. These are generalisations in a very complex moving picture, but they have proved true in more cases than not – though there have been other countries (like Singapore, South Korea and the UAE) that have also found their own successful routes through the crisis. Those leaders are often counterpointed with others like Bolsonaro, López Obrador, Modi, Duterte, Netanyahu, Orbán, Putin, and Trump who have struggled both to address the crisis itself and to inspire a unified societal response. As TIME Magazine observed, "it's not money or political orientation alone that leads to successful country responses. Leadership has been critical, and the ability to create a shared sense of commitment and sacrifice. Those leaders who took the threat most seriously early on and relied on science to guide the policy responses are the ones that have (so far) fared the best. Leadership matters, and the ongoing pandemic is the strongest argument we've seen for that in generations."[57] It would be glib and simplistic to make this point too narrowly, but the styles of national leadership that have proved most successful in the face of the COVID crisis have

points in common with those increasingly identified as effective in leading cultural and creative organisations.

In most countries, public authorities developed some form of policy response to the COVID-19 crisis. However, the scope and complexity of these measures has varied enormously depending on the financial resources available (e.g. in Asia and Korea vs India), the different relationship between public authorities and the cultural sector (e.g. USA vs China), and country-specific political choices in acknowledging and dealing with the health emergency itself (e.g. Brasil vs Canada)[58]. They also varied according to whether the measures were dispersed through different initiatives by different departments, or whether (like the proposals contained in Survive, Adapt, Renew, the eloquently persuasive report of the Expert Advisory Group convened in Ireland[59]) they were developed as one coherent integrated action plan. More than 80% of governmental response mechanisms were economic[60], supporting differing combinations of cultural organisations' core costs including staff and property costs, costs of transforming their business models or trading approaches, costs of upskilling or training their workers, and where practicable costs of continuing to produce work – all of those in the forms of either grants or loans.

National and local authorities, as well as philanthropic organisations and other investors, have adopted a wide array of measures to support creative and cultural sectors through the COVID-19 crisis. Several countries have put in place public funding initiatives to provide short-term liquidity to support workers and later to relaunch businesses. CCS businesses and workers have also been eligible for general policies aiming to relieve some of the financial pressure of the pandemic. In many countries, businesses and employees have benefitted from loan provision and guarantee schemes, income support, and flexible mechanisms relieving them from economic and administrative obligations.

Together, all these policies have contributed to shielding many cultural and creative workers and businesses from at least some of the economic crisis induced by the complete shutdown of cultural venues and operations[61]. While the schemes are helping keep CCS workers in employment (including furlough income if their work is suspended) and supporting at least some of the self-employed in the short term, few represent coherent medium- and long-term approaches to the recovery of the cultural and creative sectors. Moreover, as cultural and creative employment takes so many non-traditional and diverse forms, many self-employed, freelance and casual CCS workers have fallen through the net, excluded from receiving benefits except where adaptations for non-traditional forms are part of the general package[62].

Of the general support policies only a few have been easily adapted to the specificities of the cultural sector, let alone the many sub-sectors that comprise it. National policies to support these sectors may appear similar, but in practice they have had very different impacts based on different creative and cultural industries.[63]

Faced with this profusion of business models, instead of allocating their resources to CCS businesses some governments have instead opted to provide workers directly with subsidies and grants, to support workers in the CCS in continuing their practice and operations during the pandemic closedown. Recognising the sector's fragmentation and high share of precarious jobs, in practice this approach has often proved most beneficial to the freelance, self-employed and casual workers[64].

Different countries have taken very different paths in the extent to which they have recognised the critical role of freelance and self-employed workers in the cultural sector. In January 2021 an EY report stressed the importance of ensuring that the precarious working conditions of freelancers was taken into account through specific funding programmes or in the structure of support to CCS enterprises[65]. **These 'semi-detached' forms of employment raise several challenging issues for governments.** Many of the well-intentioned pandemic-relief programmes have proved ill-adapted to these hybrid forms of employment, and self-employed people have often found they do not have access to income replacement benefits. Self-employed creative professionals also often lack access to ordinary employment protections which further reduce their resilience to economic shocks. It is also unhelpful that official statistics often fail to capture the level or location of this CCS freelance employment, so not revealing to the policy-makers the true scale of cultural employment and the importance of the sector. **A very clear lesson of government Covid-relief programmes around the world is that these semi-detached forms of employment need new, specific policy responses from governments,** to ensure that these workers enjoy proper financial and social protection, career development possibilities and skills pathways for creative workers as the ongoing norm, not just in the face of a crisis like COVID-19[66]. We need to look beyond the immediate relief programmes dealing with artists' short-term needs, and ask tough questions about current CCS working conditions, financial stability and the social recognition of artists, as well as extending sustained non-monetary support such as counselling for those who have had to weather a seemingly perpetual storm. Only then will we be able to move on to long-term rebuilding strategies which will also need to include reinvestment strategies[67].

Even beyond the specific zone of employment, government policies often find the sector-specific and highly varied business models of the CCS difficult to recognise and value. Models vary widely from small, specialist not-for-profit enterprises to major

public cultural institutions to huge multi-national for-profit players. For many creative professionals and businesses in the CCS sector, economic growth or profit making are not the primary goal but are instrumental to business that are values-driven as their central goal. Many creative businesses are based on intangible assets such as highly specific forms of skills and expertise, networks of collaborative relationships, and reputation and credit in specific creative communities. These intangible assets often sit uncomfortably with normal criteria for business supports and credits[68].

Many CCS companies have also experienced difficulties in accessing innovation support, despite the fact that the Cultural and Creative Sector is quintessentially a generator of innovation. CCS enterprises are also important suppliers of creativity to other sectors through technological cross-overs and business-to-business linkages - like the "serious games" which build on formats and tools developed in the CCS field: gamification of learning processes like the training of airline pilots or surgeons, and therapeutic strategies like provision of cognitive stimuli to Alzheimer patients. Innovation is often perceived by governments narrowly as technological innovation, with the cultural and creative sectors often being overlooked or excluded from innovation initiatives[69].

By July 2020 more than 20 countries had implemented policies to help self-employed workers and small enterprises. At the national level, ministries of culture in Chile, Colombia, Norway, Singapore, Canada and the UK were some of the earliest to announce support packages for the cultural sector. In other countries like Mexico, Ireland, Poland, Switzerland, France, and Luxembourg, independent artists have received social security payments to offset loss of revenues. In Spain, artists have had preferential access to low-interest loans. Early in the pandemic in Germany, the government allocated €45 billion to independent entrepreneurs and small businesses including the CCS. The Senegalese Copyright and Related Rights Society (SODAV) set up a fund for US$200,000 to support culture in Senegal, while Tunisia set up a Culture Recovery Fund (Le Fonds Relance Culture) to support cultural professionals. By January 2021 EY was proposing that at least 2% of European government pandemic response funds should be earmarked as a Recovery and Resilience Facility for the CCS[70].

An OECD policy report in September 2020[71] argued that the specificities of employment in the CCS meant that exceptional support measures were needed for workers and employees in the cultural sector, including a specific fund for freelance workers to compensate their lost income which could not be accessed through unemployment benefits.

The report proposed that in the short term governments should:

a. Ensure public support for COVID-19 relief did not exclude CCS firms and workers due to their non-traditional business models and employment contracts

b. Consult with CCS network organisations, representatives of self-employed professionals, small cultural and creative businesses, and sectoral employer organisations to ensure effective targeting and efficacy of policy measures

c. Address gaps in self-employment support schemes by simplifying eligibility criteria, and making them accessible to hybrid and multiple forms of employment (e.g. combining salaried, part-time work with running their own business as a self-employed person)

d. Include non-profit institutions in support programmes designed to help small businesses retain employees

e. Ensure that the support to cultural organisations reaches artists and other creative professionals, whatever their employment status

f. In parallel with income and business support measures, invest in cultural production to help the sector rebound after the crisis

g. Establish tax incentives for corporate and individual donations to encourage investment in the sector

h. Encourage private and non-profit sector mobilisation in support of CCS firms and workers

In the medium and long term:

a. Introduce recovery measures to help small firms and the self-employed adapt to structural changes (e.g. shifts in consumer habits) and seize new opportunities, including digital tools

b. Widen innovation strategies and policies to take account of the particular role and characteristics of the cultural and creative sectors

c. Invest in digital infrastructure that can embed and develop the advances in the cultural and creative sectors achieved during the pandemic

d. Promote greater and more comprehending policy complementarities between culture and other sectors

e. Ensure education benefits from advances in the cultural and creative sectors, particularly in the use of new digital tools that build on gaming technologies and other new forms of cultural content

f. Ensure health care and social services benefit from greater linkages with cultural and creative sectors to improve well-being, prevent illness or delay its onset, favour the adoption of healthy habits, and prevent social isolation

g. Develop new kinds of local strategies for cultural tourism that address the socially and environmentally unsustainable practices of many traditional large-scale or intensive tourism centres

h. Use targeted cultural policies to address social issues such as intercultural dialogue or the integration and valorisation of minorities and migrant communities and individuals

i. Support cultural and creative entrepreneurs as pioneering catalysts in the development of new models of economic and social value creation

There have been other distillations of the lessons of the pandemic in the form of proposals for future government action – in December 2020 UNESCO published Culture in Crisis: Policy guide for a resilient creative sector[72], aiming to set out the lessons of the pandemic in clearly focused form:

1. **Direct support for artists and cultural professionals**
   Measures intended to allow artists and cultural professionals to continue pursuing their creative work by protecting their income, safeguarding their jobs or providing guaranteed social security:

   a. Social benefits

   b. Compensation for loss of income

   c. Commissioning and purchase of works

   d. Skills development

2. **Support for sectors of the cultural and creative industries**
   Measures intended to guarantee the survival of organisations encountering a severe lack of liquidity or cash-flow:

   a. Accelerated payment of aid and subsidies

      b.   Compensation for business interruption losses

      c.   Temporary relief from regulatory obligations

      d.   Relief from taxes and social charges

      e.   Stimulating demand

      f.   Preferential loans

      g.   Strengthening infrastructure and facilities

3. **Strengthening the competitiveness of the cultural and creative industries**
   Measures intended to help the cultural and creative industries ready themselves for the new conditions in the post-pandemic domestic and international markets:

         a.   Participatory needs assessments and feasibility studies

         b.   Adapting business models

         c.   Promoting national content

         d.   Tax incentives for foreign investment

Each one has factsheets including a description of the measure; an explanation of its aims and the needs it seeks to address; a brief survey of the actions to be considered for implementation, and a short list of pitfalls to avoid. At least two examples of good practice are given in each of the factsheets, offering an overview of initiatives taken in countries and regions around the world that might be of interest to the international community as a whole.

Governments and the public sector in different countries have adopted different approaches tuned to the particular needs of their cultural communities. A report by an Indian consortium convened by the British Council recommended as response strategies to the Pandemic[73]:

1. Concerted emergency action now for investment between governments and corporates through:

         a.   Loans and grants to cultural organisations, e.g. mandate culture in the CSR funding plan

    b.   Micro-grants to freelance artists, gig-workers and artisans, e.g. use the National Culture Fund to provide grants for urban and rural traditional performers and artisans

    c.   Timely disbursement of grant in aid schemes for currently funded cultural organisations

2. Strengthen the creative economy for India's international competitive advantage. National action across the creative industries to:

    a.   Recognise the cultural and creative sector as an integral part of the social and economic recovery plan

    b.   Secure and strengthen the creative economy for the long term, e.g. use current festival schemes by Ministry of Culture and Zonal Cultural Centres to create digital festivals and provide payments towards royalty and for video recording purposes

    c.   Ally with national and state government intervention, e.g. create cultural districts in every Smart City to allow for performance spaces, rehearsal venues, libraries, studios and artists offices.

3. Establish creative economy networks of artists, artisans and cultural organisations to develop sector, city, state and national knowledge and impact for:

    a.   Presenting a compelling evidence-based case for public sector investment

    b.   Pooling resources for mutual support

    c.   Sharing learning across the diversity of India's languages, creative industries and artforms

Following the immediate first-stage rescue packages, some countries have now moved on to introduce measures to help restart the cultural and creative sectors as they rebuild from the impacts of COVID-19. Australia has introduced a comprehensive set of measures[74] to support cultural production, stimulate job creation, support significant culture organisations, and put in place a dedicated task force to drive the implementation of measures like:

- Seed Investment to Reactivate Productions and Tours
- Show Starter Loans (to fund new productions and events that stimulate job creation and economic activity)

- Kick-starting Local Screen Production; Supporting Sustainability of Sector-Significant Organisations, and Creative Economy Taskforce
- Job retention and income support measures and unemployment benefits
- Deferral of payments, tax relief, procedural flexibility
- Plus many support schemes created to support the CCS by private for-profit companies – Netflix, Live Nation Entertainment, Spotify, Sony/ATV, Bandcamp, Universal Music Group, Soundcloud and Beatstream

In Denmark a February 2021 report[75] for the Ministry of Culture from the Culture and Sports Restart Team (Feb 2021) proposed a more direct approach – that the Government initiate a broad nationwide campaign timed to coincide with the re-opening of the cultural and sporting sectors to encourage citizens to take part in cultural and sporting life again. The report proposed a nationwide campaign of two elements: firstly a high energy communications campaign supporting a return to culture and sports, and then a '100 days festival', expressed as a kind of celebration of the reopening of Denmark's cultural and sporting life.

The UK is expressing the same kind of idea in the Festival UK* 2022[76]. It came into being by a complex BREXIT-derived route predating the Covid pandemic[77], but in its colossal national scale, the unprecedented breath of its vision and its anarchic energy Festival UK* 2022 may prove to be just the kind of celebration of a revived and re-born cultural sector that pandemic-weary communities need.[78]

Looking at the wide range of different public sector initiatives to support the Cultural and Creative Sectors around the world, some lessons start to emerge for designing public sector support in times of sudden and extreme challenge, many of them also applicable to Government support for the sector more broadly:

1. Clarity (and consistency) around the design of each programme, its purpose and its scope

2. Realism about the necessary length of the programmes to have their full effect, and of application periods, and in the calibration of budgetary and revenue qualification thresholds

3. Programmes that benefit the whole creative and cultural ecosystem, including (between them) support for profits, non-profits/volunteer-based organisations, charities – all of whom make essential contributions to the many different parts that together make up the ecosystem as a whole

4. Programmes that embrace all the people working in creative and cultural organisations and projects, whatever their employment status

5. Programmes offering long-term solutions to long-term and structural challenges, alongside other programmes that can show immediate results and which bring immediate relief where it is needed

6. Both strategic and tactical investment in digital initiatives:

   a. that increase digital literacy, skills and capacity

   b. that support digital R&D

   c. that support the transformation of business models, including through innovative programmes of market development and communication

   d. that support organisations in accessing digital equipment and technology

   e. that expand access to the arts

   f. that support creative projects in the performing, visual and media arts, both entirely digital and also hybrid projects where digital technologies are part of a larger whole.

7. Support for post-pandemic activities and recovery

8. Formulae for Universal Basic Income and Minimum Wage that embrace the full spectrum of employment models in the CCS

One critical success factor that emerged again and again was the value of close collaboration between the CCS and government and its agencies. It is also important that governments clearly signal their intention to support the CCS at the start of a crisis, explicitly recognising the sector and its distinctive attributes in development plans from the start as an essential pillar of the national fabric[79].

Alongside national and regional governments, many city governments are also playing important roles in supporting pandemic recovery, where initiatives can be tuned more specifically to the existing local strengths and resources and potential and needs of their cities. Creatively successful cities map their cultural and creative assets strategically, to leverage these assets and identify and addressing the constraints to their growth and development.

A 2021 report from the World Bank/UNESCO (Cities, Culture, Creativity, Leveraging culture and creativity for sustainable urban development and inclusive growth)[80] looked around the world at specific examples of ways that could work, starting with understanding the cities' assets and comparative advantages. In some cities, like **Madaba**, these assets are clearly defined (mosaics). In other cities, like **Kobe**, the aftermath of a disaster can create circumstances to revisit and rediscover their unique culture. Some cities leverage and reshape their own unique assets, as in **Angoulême**, where its renowned paper industry and rich literary tradition paved the path to nurture a new sector (comic books and graphic design). Cities like **Seoul** are strongly placed to form locality-based creative clusters, drawing on an understanding of local conditions and the potential of specific parts of the CCS. While it is not always necessary, industry and market assessment can help develop baselines and targets for growth opportunities. Whatever the local situation, gaining deeper understanding of local creative and cultural assets is an essential starting point for any policy making. **Kyoto** demonstrates the powerful potential of creative communities and their ability to transform small, sometimes abandoned urban spaces. Public investment in **Kyoto** was able to support the growth of artists and creative communities through multiple interventions. **Seoul** shows how sound market assessment and carefully coordinated interventions enable governments to play an effective role in leading the development of CCS ecosystems. These policy initiatives need to be accompanied by adequate legal frameworks of support; specialised agencies; crosscutting institutional mechanisms, value-added networks and dynamics among various actors and agents; physical infrastructure for collaboration; and a tailored support system, ranging from training to financial and legal services to marketing. Brazzaville's experience shows that a local government can invest in strengthening the foundations for the continued development of the CCS. In **Brazzaville** this included supporting the creative process through the provision of musical instruments and artist residencies, aiding distribution by creating spaces and events for music to be performed, focusing on professionalisation and commercialisation of the creative product. **Santos** municipality used the power of culture and the creative economy to achieve social and economic change in a challenging context. Effective collaboration between the public and private sectors, non-profits, and financial institutions was important in achieving the change. In **Angoulême**, different CCS players and city officials collaborated to strengthen the sector. Acknowledging the socio-economic vulnerabilities of creative professionals, city officials worked with them to integrate their proposals and recommendations into public policies, to address problem issues and improve the CCS's overall ecosystem. **Belgrade** shows how creative entrepreneurship and organic creative communities, if linked with other social forces (journalists, the wider media, the academic community) can have an important role in creating bottom-up cultural policies, promoting innovation in the creative sector. These

bottom-up policies and activities have significant potential and can be catalysts for more vibrant cultural life, contributing to the transformation of neglected urban buildings while creating a new identity for once abandoned or neglected industrial neighborhoods. The Belgrade experience also highlights the limits of bottom-up initiatives and their vulnerability to capture as in the case of Savamala District. When the area became attractive the public authorities saw its economic potential and offered the area to investors without any concern for the future of the creative entrepreneurs that would be displaced. In this newly gentrified neighborhood there is no longer a place for The Mixer House, one of the central areas for the creative community that had to rely on its own resources to find a new location for its festival (moving to Sarajevo and back to Dorcol and finally in 2020 to a village near Belgrade). [81]

Of all the issues that will most benefit from comparative analysis once the pandemic is behind us, the different approaches taken by governments to supporting the cultural and creative industries will be one of the most important. Traumatising disasters and the destructive discontinuities they bring, after the immediately remedial first-aid attention, then need strategically planned initiatives for restoration, recovery and rebirth, that not only seek to repair the damage wrought by the disaster but more positively chart a route forward to 'new normals' - that may look very unlike the old normal. It may even be that the new normal sees art and culture becoming a more organically integrated part of the everyday and cared for, possessed in common as part of social citizenship[82].

In amongst the chaotic global turmoil of COVID-19, we have seen so many changes that offer so much potential for the future. We have seen an enormously accelerated digital upskilling throughout society, for consumers and producers alike, with many organisations suddenly able to develop new global visibility and relationships online. We have seen new behaviours – a readiness to support people facing particular difficulties, a greater awareness of the vulnerability of elderly people, of the needs of people at risk of isolation and of homeless people, of marginalised communities, and a respect and gratitude for carers and care-givers.

More generally, we have seen a widespread recognition of the value of civic engagement, discovering (as so often in times of crisis) that there is such a thing as society. Long forgotten words and values have become important – like kindness, empathy, generosity. We have rediscovered enriching kinds of behaviour, recalling for some North Americans the seven traditional teachings of first nations[83] which offer such strong moral foundations for respectful community relationships.

Through this long, enforced period of frozen suspension of so many activities and relationships, with the sudden, convulsive move to working from home came massively reduced traffic and so many other environmental benefits. We have experienced cleaner cities with less pollution, more space for wildlife, more birdsong, no stressfully mind-numbing commutes, the pleasures of walking and cycling, more time for family relationships, more awareness of neighbourhood, more 'living local'. The experience of working from home has left many people reluctant to return to a working life spent entirely in communal offices, preferring a more flexible kind of hybrid working life. Many studies have confirmed these underlying changes in people's relationship with their work[84], increasingly comfortable with remote interactions and impatient with the stresses and fatigue and wasted time of long commutes. The Harvard Business Review[85] reported (in a wider review of the future of home-working) 5,000 surveyed Americans saying that post-pandemic they wanted to work from home an average 2.5 days a week, and evidence from around the world, both formal and anecdotal, suggests Americans are not along in that kind of aspiration.

The pandemic has caused terrible losses and casualties, and destroyed some elements of our society beyond hope of repair, in addition to the relentlessly climbing death toll reflecting the vaccine inequality around the world that is such a terrible indictment of today's world order. But in the agony of that journey we have learned many things as individuals and as societies, about how our world could be different, and better. Some of that lies in our own hands to secure for the future but it will also be a key test we will want to apply to governments' responses to the pandemic – how far their decisions and actions lead to a new, better kind of world rather than simply recreating the world as it was in 2019.

Programming and content

This section is relatively short. It could have been limitlessly extended if it had included all the innovative developments in creating, presenting and distributing content around the world in the teeth of the pandemic, but some of those points have already been made under other headings, and the global diversity of initiatives is far too great to try to summarise in this short study.

However some more general changes are already visible – not universal, but widespread enough to identify:

- As **performing arts** organisations resume business after the pandemic, where previously their work was mostly experienced live in indoor venues or outdoor settings, after the online explosion of the past 18 months it looks unstoppably likely that in future more programming will have hybrid and interactive aspects[86], both in terms of consumption and in terms of the artistic content itself.

- **Visual art collections and museums** all over the world were being digitised before the pandemic, but pre-Covid that online presence was positioned a long way below the value placed on the live experience. Now it seems very unlikely that all the work that has gone into creating and promoting the new digital assets and making them readily available online, often with much enhanced interpretive information, will be thrown away. That will have the huge benefit of making the great collections of the world universally accessible, as well as more deeply understood and so perhaps more deeply valued. More broadly, a study by the Museum Innovation Barometer of 150 institutions representing 200 museums from 39 countries included in its summer 2021 edition[87] six "significant developments in the museum realm due to COVID-19" including, beside digital developments, pandemic effects on museum staff, on audiences, and on the community positioning of museums.

- Before the pandemic, the physical locations of **cultural festivals** around the world were the essential core of the festival experience, while during the pandemic many festivals have developed enticing online identities that again look very likely to result in a new kind of mixed construction for future festivals. Amongst other consequences, that will also enable people wherever they live to experience at least parts of the world's arts festivals from home or wherever else they are.

- For **cinema**, the pandemic has had more complex consequences. Although the flow of new titles dried up almost completely during the pandemic, film-lovers have

grown more accustomed to seeing a greater range of content, old and new, without leaving their homes, and it is hard to know how far the social aspect of cinema visits (so important in the performing arts) will lure film-lovers back into cinemas. Already before the pandemic traditional cinemas were feeling the cold blast of competition from instantly accessible online platforms, and there must be at least a risk that the pandemic will have accelerated that trend.

- **Across the CCS as a whole surveys of online consumption revealed that during pandemic lockdowns families with young and teenaged children have consumed online culture more than they previously consumed the live arts**[88] - cultural programmes and also educational and training programmes. Partly that reflects the much greater affordability for families of online consumption, but it also seems that adults have used this fresh universe of online culture as an educational tool in ways that are largely new, and hold exciting potential for the future – for both consumers and producers.

In many communities, the Covid crisis drove cultural organisations and their leaders to work together more closely and collaboratively than had previously been the norm. In several cities around the world new collaborative support networks quickly sprang up amongst players who had previously seen one another as competitors. Initially they were self-help exercises to share the individually traumatising experiences of facing the pandemic challenge, but many are now looking to the future. In the UK one such network in Manchester has now generated an ambitious post-Covid recovery plan[89], and many of the new networks are now reaching out to support individual artists and smaller cultural companies.[90]

These networks offer their members many valuable benefits - in shared learning and problem-solving, collaborative consumer research and marketing, integrated city-wide ticketing networks, joint and shared purchasing and the much increased power of a critical mass in negotiations outside the CCS – with public bodies and major corporates. There are many examples around the world of mature networks and consortia that were established long before the pandemic, showing where these journeys can lead, like those in Philadelphia[91], Montréal[92] and NewcastleGateshead[93].

One of the most spectacular networked project to have arisen directly out of the cauldron of COVID-19 was born in Berlin, now a global phenomenon. On March 13th 2020 Berlin club culture faced the biggest challenge in its history when the city's entire nightlife was shut down

overnight, and the same week the city's panicked clubs created United we Stream[94]. Within six months 35 million people in 39 partner cities were engaged in different ways with United we Stream, by then involving 370 clubs and over 1,550 artists - creating a new kind of inclusively transnational club-night experience which individual clubs could never approach. What was initially a frantic revenue raising bid to save Berlin clubs has evolved into a global cultural platform and streaming initiative in the digital space, offering low-threshold access and connecting local cultural spaces, artists, cultural workers, companies and institutions with a global audience, while preserving a diverse club culture and its values. Today they offer streams from 425 locations in 92 cities worldwide to an online community of over 40 million.

It is hard not to believe that the members of many of these networks will want to retain these benefits and build on them after the pandemic is over.

For many companies and artists touring was the lifeblood of their work before the onset of COVID-19 - it was not unusual for some of the companies most in global demand to be travelling for three quarters of each year. During the pandemic-enforced interruption of touring, many cultural leaders have been thinking afresh about their whole approach to touring - at a time when cultural leaders generally have been more and more preoccupied with the issues of climate-change and sustainability. These plans are in their early stages, but fresh approaches to touring are now starting to be discussed where daily city-hopping, often with air travel and performances on alternate days throughout the tour, would be replaced by longer visits to a smaller number of hub centres where more meaningful kinds of relationships could be formed. New kinds of artistic residencies and partnerships would take the place of the old more promiscuous model of perpetual travel. Arts residencies can engage local communities more deeply than many other arts activities, often being powerful forces for intercultural understanding. When the pandemic is over, we may find that arts residencies play an important role in the re-invention of touring and the emergence of new kinds of national and international exchange[95].

There are so many moving parts to this picture, so many responses to the pandemic still being developed and explored. It is not easy yet to see which of these responses hold keys that will be important in the new world of post-pandemic culture - and some of those keys will be held not by cultural organisations but by the way audiences behave, the choices they make, how they respond to the changed experience of the post-pandemic world.

But those challenges are not holding back creative minds eager to explore the new territory. In Denmark ideas are being developed for an agile, cross-cutting exploration project; an Innovation Laboratory[96] which can support the development and evaluation of smart new solutions, formats and concepts, and help those parts of the sector that have difficulty re-opening. Innovation Laboratory will bring together professional skills and resources to identify, develop and test new approaches to re-starting culture life in the short-term and then to create enhanced user experiences in the longer term. Innovation Laboratory could bring partners together in real time and secure sharing of best practices across multiple stakeholders. It is being designed as a 'project organisation', with representation in its governance structure where both culture and sport are involved. A steering group is to be established across the cultural and sports sectors, ensuring the new solutions can benefit both cultural and sporting life.

As yet the Innovation Laboratory plans are some way ahead of reality, but some producers are already seizing new opportunities they have discovered with eager ambitious hands. The UK's Brighton Festival has been developing the idea of a 5G festival[97] in collaboration with the leading UK innovation agency Digital Catapult. Although 5G Festival was not born of the pandemic it shares the same adventurous spirit, born of efforts across the sector to create innovative approaches using advanced digital technology. 5G Festival will allow artists to collaborate remotely and develop new types of digitally enhanced live experiences, at festivals and for audiences at home or wherever they are in the world, as well as producing immersive in-venue experiences. The power of 5G technology will allow physically separate artists to produce live, collaborative performances. Audiences also need to feel emotionally immersed, so the festival has worked with a videographer to create a dynamic, visual environment that wraps the viewer in an immersive audio-visual experience.

Cultural creators and presenters have learned so many new skills and explored so many new presentational approaches in the past two years which it's impossible not to see representing new foundations for artists', producers' and presenters' creative thinking as the iron grip of the pandemic loosens. Out of the fire of destruction and loss from the pandemic, so many glowing embers and sparks hold so much potential for new kinds of cultural activity, new kinds of organisations, and new kinds of relationships with consumers, audiences and the wider community.

Audiences, consumers and markets

All this thinking about future approaches to programming and content assumes that there is still an audience champing at the bit to reconnect with that programming. Analysts have quickly seen the need for intelligence about people's readiness to re-engage with live culture as the pandemic retreats, and that is the area that has so far been most thoroughly studied and researched of all the Covid effects on the CCS. All around the world specialist cultural business and market analysts have been providing that intelligence in real time. Companies like the UK's Audience Agency[98] and Purple 7[99] (the latter working with TRG[100] in the USA on a series of Insight Reports), Canada's Nanos Research[101], Taiwan's Performing Arts Alliance[102] (planning to publish a report in November 2021 focusing on lessons and learnings rather than impacts), the Association of Asia Pacific Performing Arts Centres[103], Cupore[104] in Finland, several EU reports, the global work being done by the USA's WolfBrown[105] and by members of the Cultural Research Network[106] (some of it produced in partnership with Cultural Trends[107]) and others like them are all providing data to inform the emerging thinking about how the cultural sector can most strategically position itself for the future.

These analytical and research agencies have almost all worked to establish a credible evidence base for looking ahead, in most places finding that after the unprecedentedly long disappearance of live culture from our lives there are now growing levels of pent-up demand. That is particularly true amongst younger communities – though researchers all over the world agree that reassuring communication about safety measures is critical in welcoming audiences back to their first in-person events. Meanwhile, online levels of cultural engagement have increased among older visitors, and in many places now exceed those of younger cohorts. Many have come to appreciate online's convenience, safety, affordability and ease of access from remote locations, and WolfBrown are typical in finding only a quarter of their respondents not expecting online cultural programming to play any further role in their lives after the pandemic[108].

Around the world cultural presenters are asking what will encourage people to return to indoor and outdoor events, and the detailed Canadian work of Nanos Research[109] (working with Canada's National Arts Centre and Business / Arts) gives answers that all make intuitive sense. In those surveys culture-goers increasingly report that they plan on returning to cultural events once businesses reopen and are following public health guidelines, saying they would be most strongly influenced by precautions like:

- Vaccination, themselves and fellow audience members

- Social/physical distancing, in auditoria and as far as possible lobby spaces

- Face masks

- Believably effective ventilation and venue cleaning protocols

- Evidence that venues are following current medical/ government guidelines

- Smaller capacity events

- Availability of hand sanitisers

- Reducing numbers of cases of COVID-19

- Health Check Screening

And this kind of returning confidence appears iterative. UK consultants Indigo surveyed people after attending their first reopened live events, and the July update of their Culture Restart Experience Survey[110] (questioning audiences in the two weeks after UK restrictions were relaxed on 19th July 2021) found a 22% increase in audience confidence after attending a live event. Before the event 59% felt sufficiently confident to attend compared to 81% after, and over three quarters said the visit made them more like to go to other future cultural events. But as yet the evidence is not fully conclusive, pointing in different directions in different places. In the UK, reduced audience appetite for the normally guaranteedly popular family offerings at Christmas is leading some theatre leaders to wonder whether this uniquely extended shutdown has caused some audiences to lose their old theatre-going habits altogether[111].

In their survey, Nanos also found culture-goers becoming more comfortable supporting their favourite cultural organisation in 2021 by buying single tickets than a membership or a subscription. Just over one in two culture-goers said they would feel comfortable (29%) or somewhat comfortable (24%) making single ticket purchases in 2021, while only one in four say they are comfortable (12%) or somewhat comfortable (15%) paying for annual subscription or membership[112].

At the start of the pandemic culture-goers seemed to feel a duty to support cultural organisations financially in the challenging COVID-19 environment, but as the pandemic claimed casualties beyond the cultural sphere their philanthropy became more thinly spread. In 2020 they reported that they expected their donations to cultural organisations to drop by 20% in 2020 compared to the 2019 base year. Their

hope that in 2021 they would make up for that reduction by increasing their donations by 40% compared to 2019 has to regarded at this stage as provisional![113]

American culture-goers say they have been aware of, but do not prioritise, the financial struggles of cultural organisations during COVID-19. Research by the LaPlaca Cohen Culture Track team shows how the pandemic has exposed the cultural sector's representation gap and need to be more responsive to its various communities, and also the widely reported way many communities of colour have suffered disproportionately from the COVID-19 crisis. LaPlaca Cohen see cultural organisations as now on the front lines of this long-overdue national reckoning[114].

There has been evidence all over the world of cultural organisations urging their customers, in the case of cancelled or abandoned events, to donate the value of their tickets to the company's bottom line or at least to redeem the transaction when the company re-opens rather than asking for a refund. Opentix, the ticketing system used mostly in Taiwan, is just one of many ticketing systems throughout the world to encourage the audience proactively to donate the value of their ticket for an aborted event to the producing company instead of seeking a refund. More generally the pressures of the pandemic have pushed cultural organisations, as they have pushed so many other industries, to refine their customer relations through these kinds of initiative, designed to offer customers better, more responsible, more flexible kinds of engagement, while also being alive to the possibility of monetising the relationships in new ways.

South Korea reported an interesting finding[115] about the way Seoul residents have used the greater degree of free time they have had during the pandemic. The average Seoulite reportedly had 12% more free time on weekdays and 8% at weekends – reflecting reduced time spent travelling due to remote working and fewer group activities and group meals. But, counterintuitively, the pandemic turned out to have sharply reduced people's cultural activities in terms of going to the performance events, museums and cinemas that were still open, down 38% from 2018 to 2021 despite the extra free time, with the average amount of money spent on those activities also dropping by 38%[116]. Then, asked how far they had participated in cultural events switched online, nearly 40% said they did, with about half saying they were satisfied with the experiences. In listing the shortcomings of online events, 39% cited a lack of a sense of reality, followed by the poor quality of picture and sound (20%).

Digital consumption during the pandemic is an area which has been closely surveyed and studied around the world, both as a success check on the new digital offerings and also as a pointer to how consumers may behave once the live offerings return. In a 2021

study of digital engagement by the Washington DC public by the UK analysts Morris Hargreaves McIntyre[117], 62% of the whole market had engaged with digital content from a cultural institution in the last year, rising to a startling 82% for those with children under 18 living at home. 36% said they had enjoyed the digital content but expected to stop when they could return to 'the real thing', where 49% expected to continue engaging with digital content from cultural institutions even after they reopen.

The issue of readiness to pay for online culture and at what price-point is also being closely studied, since it will be critical to decisions about the post-pandemic balance between live and online offers. When the Washington study[118] asked arts-goers who had engaged with digital content whether they had paid for any of it, 39% said they had. Those with children at home were significantly more likely to have paid at 57%. When asked about the maximum amount they would pay for digital content from cultural institutions, over half said they would pay somewhere in the $5-$25 range, with 46% saying they would pay more than that. When asked what type of content they would pay for from of a range of digital content from cultural institutions, livestreams were the most popular at 31%. 38% of those with children were interested in paying for educational resources for children, and 37% would pay for gallery or museum tours. LaPlaca Cohen research reported that many respondents now using online cultural offerings had not physically visited the same kinds of cultural organisations in the previous year, making them potentially accessible new patrons for live events. The same research reported American cultural consumers now more often expecting cultural organisations to help their communities decompress and stay connected during the COVID-19 crisis, wanting cultural organisations to become more active participants in their communities than just as providers of culture, and wanting to see their communities better reflected in these organisations[119]. The study included some revealing statements from responders:

- "Almost all the online activities I tried provided a sense of community and a strange kind of intimacy. There was a sense of being connected with the world outside my house and the grocery store."

- "It was a chance to keep in touch with creativity, especially when it comes from artists or places that I admire. The chance to interact with them is a plus."

- "Right now, I am looking for things to do with my children that allow us to be together and to enjoy something I don't have to organise myself. I want them to learn and to experience the world."

- "Our nation's chief problem during the last 50 years is its declining social cohesion. Seems as if the arts have a role here. This wasn't acknowledged before the pandemic but would be vital as we move to a different existence within the world-wide community after the pandemic. "

In addition to their work in the USA, WolfBrown have also carried out an Audience Outlook Monitor study in Australia[120], and findings in March 2021 reported that despite the lockdowns, a majority of cultural audiences were continuing to make future plans to attend events (74%). Looking ahead to the next 12 months, most cultural audiences said they expected their overall spending on cultural activities to be at the same level, or higher, than pre-pandemic levels. Meanwhile 44% continue to participate in culture online, and 52% see a role for digital experiences in their lives long-term.

In New Zealand there have been two studies bearing on the pandemic. Creative New Zealand's research study New Zealanders and the Arts is a triennial research programme and the 2020 version including the pandemic has just appeared[121]. The Ministry for Culture and Heritage has also published a one-off research study into the cultural landscape during the pandemic[122]. In these studies New Zealanders are reportedly very positive about the vital role the arts play in their lives – "The arts are making a powerful contribution to New Zealanders' wellbeing, and are helping us get through COVID-19 … The arts are helping more of us explore and build our own sense of identity, as well as growing our connections with other New Zealanders."[123]

In the UK and USA, data from 260 CRM systems reveals that while ticket sales have plummeted for all buyer types during the pandemic with the near-universal lockdowns, the greatest decline has been in older audiences in both the UK and the US. Younger demographics are widely reported as more affirmative in welcoming the prospect of an audience return to 'normality', which presents potential financial challenges to cultural organisations since the combined average value of ticket purchases and donations is far higher for older patrons. Balancing growing the number of younger patrons engaging with alternative artistic product while also retaining older generations' philanthropic support is an emerging touchstone for finding resiliency through COVID-19[124].

Interestingly, while US attendance at cultural organisations is unsurprisingly down, the percentage of attendance made up of non-recent and first-time visitors seems to have risen. The same has been true of exhibit-based organisations, who (according to the Chief Market Engagement Officer for IMPACTS, specialists in predictive market intelligence) also report welcoming a higher percentage of non-recent and first-time visitors than before the pandemic[125]. The average percentage of new and non-recent visitors increased a striking 51% from 2019 to 2020 – from 9.4% of attendance to 14.2% of attendance. The percentage of these new or recaptured visitors was actually decreasing before the pandemic, making the jump in 2020 even more dramatic. These studies and others like them reinforce the message from other research around the world that during the pandemic many people who were not regular arts attenders have been exploring cultural offers, either returning after a long absence of visiting them for the first time, both live and online. The evidence also suggests audiences are likely to stick with online cultural offers from outside their geographical reach or which were previously inaccessible to them in other ways, or where there is some distinctive creative value in the online offer which live culture cannot offer.

Looking at this research worldwide, the evidence does not unequivocally point to the discontinuity in physical attendance leading to lower eventual physical attendances after the pandemic, though the extent of Covid-caution is likely to mean those figures return slowly rather than overnight on re-opening. It is also interesting to see what kind of programmes arts presenters are planning in order to entice their audiences back into their venues. A June 2021 study by audience analysts TRG[126] found that whereas 68% of US presenters and 58% in the UK planned to return with the same programme balance as before the pandemic, only 33% of Canadian presenters were just relying on their pre-Covid programming mix to lure their audiences to return.

Likely interest in future online offers is harder to predict, and it is likely that audiences themselves cannot yet foresee their continued online engagement, not yet knowing what choice of online offers will remain once cultural organisations are again presenting live events. However, current survey responses do suggest that cultural audiences who have explored online offers during the pandemic are likely to continue to explore them once live culture returns – to an extent that will partly reflect how enticing those post-Covid online offers are!

Overall it does look as if the changed ways in which some audiences have come to regard cultural organisations during the pandemic may lead to different kinds of engagement in future, potentially deeper – from both sides. The enormous extent of current research

suggests that when live culture starts to return after the pandemic, CCS organisations will know more about their audiences, the things that are most important to them, the kinds of relationship they want and the best ways to communicate with them. Reciprocally, current research suggests that audiences may be becoming more interested in the social positioning of cultural organisations they support rather than just their cultural products, and seek deeper and richer relationships with them. Taken together, all the different strands of research around the globe suggest that in the post-pandemic world we may be looking at freshly re-energised, deeper and more meaningful relationships between cultural companies and their audiences and communities than we were accustomed to before the pandemic. That has to be an exciting prospect offering profound potential to our cultural ecology, both for producers and for consumers.

Communications

One of the clearest messages from all the evidence of the pandemic time has been that in many countries and communities the cultural sector has not established a high priority in the minds of civic, regional and national governments. 53 countries (interestingly, not the USA[127]) have ministries of culture (sometimes shared with other portfolios like education, heritage, digital media and publishing, libraries, tourism, sport, outdoor recreation), and those ministries can normally be expected to understand the importance of culture, but that does not mean governments as a whole share that understanding. Government cultural budgets are typically only a very few percentage points of overall spending (1.2% of GDP spent on culture, religion and recreation by EU governments in 2019[128]), and often the post of Culture Minister is low in government food chains. In times of crisis for the larger cultural institutions, their leaders will often reach out directly to presidents or prime ministers or finance ministers rather than lobby via the culture minister, and during the pandemic most major decisions about governments' recovery investment priorities have been taken above the level of culture departments.

The very different extents of government pandemic support for the cultural sectors of different countries and regions, and the speed with which those decisions had to be taken, have reflected – sometimes with brutal clarity – where the cultural and creative industries sit in the priorities of their governments. Industries that fared best in these contests were either those where deep cultural understanding was endemic in their countries or which had effective, articulate and well informed umbrella bodies speaking for the sector as a whole. In the UK there is the Creative Industries Federation[129], but it was only founded in 2014 and does not seem to have played a defining role in guiding the UK government's COVID-19 recovery strategy.

For all these reasons, one of the most important lessons from the pandemic is that the cultural and creative sector needs to create an effective and compelling communications programme for policy makers and political stakeholders. It needs to highlight the importance of the cultural sector to the wider community in the form of a holistic new value proposition for the CCS as a new basis for seeking political recognition and investment for the sector, both in terms of its cultural goods and in terms of all the other goods that the cultural sector contributes every day to the wider community, many of which have become more visible during the pandemic[130].

John Myerscough's seminal The Economic Importance of the Arts in in Britain[131] was an important, specifically framed step on that long road, designed to appeal to Margaret

Thatcher's economically reductivist thinking, but throughout the past century there have been many different ways of explaining the multitude of different kinds of contribution our creative and cultural sectors make to their communities[132].

However, this is not a task that can be undertaken suddenly, from a standing start, in a crisis. It is a task that requires constant, continuous, strategically managed, intellectually and politically coherent high level communications. During the pandemic, in countries where that truth has long been understood, governments understood instinctively the importance of supporting their cultural sector. In countries without that instinctive understanding and where leaders in the cultural and creative sectors had neglected that task, government support in the hour of need was not so dependably forthcoming, or was misapplied.

There were exceptions – places where the pandemic was a uniquely potent opportunity for the sector to self-organise quickly, sharpen its voice and initiate or strengthen dialogue with policy-makers. The policy-makers were then pushed to gain a deeper understanding of how the sector functions, how exposed it is, but also how valuable for society – helpfully for the longer-term future. Based on what the pandemic has taught us, many CCSs around the world now recognise they need to review and reshape their approach to articulating the full extent of the holistic case for public sector investment in the CCS[133].

Recovering and re-incentivising audiences for the in-person arts after the longest ruptured discontinuity in living memory, and building refreshed contemporary relationships between the cultural sector and the communities we serve, will need inventive thinking about a new approach to strategic communications. We will need refined approaches to communicating cultural messages using all available online and physical channels to re-establish the arts in public life from what is effectively a standing start, and consciousness, based on all we have learned during the crisis, of citizens' aspirations for new kinds of deeper relationships.

And we will need something else that goes beyond any of those things. Beyond those fresh approaches to outward-facing communications, we will need to understand where our audiences and our communities are starting from after the profound, seemingly endless cultural desert of the pandemic. Will they return as we remember them before COVID-19 struck, or will they have themselves been changed by the experience, which has fractured so many of our other pre-Covid relationships and understandings of the world around us. This is a challenge few people are as yet exploring, but it may prove to be one of the most important of all. Andrew McIntyre of Morris Hargreaves McIntyre has started opening that door, and the

third of his three Culture in Lockdown essays, Covid Audience Mindsets[134], explores how our post-lockdown audiences may differ from the audiences we thought we knew before the pandemic struck.

All of these approaches and tools, surveys and analyses, hold different keys to connecting with our audiences, consumers and communities as the pandemic finally retreats. None of them can answer all the existential questions we are asking about re-opening our cultural enterprises after this unprecedentedly long closedown, but between them their different approaches will help open cultural leaders' minds to the fresh thinking the new world will require. Between them they will enable us to seize the unique opportunity contained in this extraordinary moment for profoundly re-positioning and enriching our relationships with the world outside our doors.

What next?

For many people the pandemic has a while yet to run, and our emergence from COVID-19 will be a slow transition rather than a sudden event. The scale and severity of the pandemic will gradually abate; wise governments will release their response measures paralleling the rhythm of that recovery, while the cultural sectors in different regions around the world will experience the results of those changes at different times and at different speeds. It will not be possible to assess the full global extent of COVID-19's multiple impacts until after the pandemic is over, or at least until the virus is normalised from its current emergency status.

However, already we can see some implications of this tumultuous experience for future action – for research that will fill in gaps in the analytical map; for actions that cultural leaders may want to take, and for the relationship between the CCS and governments.

1. Research

   a. It is already clear globally that **some leadership approaches and styles** have proved much better able than others to make sense of the tsunami of complex challenges contained in the COVID-19 pandemic. Research into the efficacy of those different leadership approaches would make a valuable contribution to our understanding of the dynamics of management and leadership more generally.

   b. Specifically for the CCS, gathering together a retrospective global audit of the effectiveness of all the **different public sector interventions** would suggest how they should be applied, or not, or applied differently, in future crises.

   c. To make sensible decisions for the post-Covid world it will be important to understand the full extent of the multiple, interconnected short- and long-term **impacts of COVID-19** – economic, social, clinical, political, psychological, and the many indicators of the pre-Covid sector's fragile business resilience and employment precarity.

   d. The pandemic has shone a bright light on the huge range of formal and informal **employment structures** in the CCS – including awakening stakeholders to the exposure of the sector with a third of its employment made up of freelance, contract and self-employed work. An authoritative study of these CCS employment metrics, including understanding the extent of people driven to

leave the sector entirely, will help governments target future support measures more effectively and inclusively.

e. It seems that the economic pressures on **consumer spending** hit the CCS disproportionately hard - since most cultural spending by most consumers is discretionary rather than essential. It would be valuable to add a metric to more general studies of consumer spending giving visibility to this discretionary aspect of cultural spending, particularly squeezed at times of wider economic hardship, exacerbating the fragility of many CCS business and financial models.

f. COVID-19 struck us at a vulnerable moment in our own history, when the ubiquitous dominance of social media and rampant disinformation campaigns have led to our relationship to truth, to belief, and – critically – to our understanding of risk all being seriously compromised. Every day of our lives, at work and at home, we make decisions based on our perceptions of risk, so our **damaged ability to assess risks is undermining our ability to react rationally in judging how to live and work and behave.** The consequences of our compromised ability as a society to handle risk rationally are serious, and need urgent study and attention.

g. Ever since the emergence of digitally enabled **online culture** in all its different forms, artists and cultural leaders have struggled to develop new business models that would help them monetise the new online content and distribution channels. The vertiginous growth in the use of digital tools to create and distribute cultural products and services online during the pandemic has emphasised the urgent need to develop viable regulatory ways of enabling artists and the CCS to monetise their online content and creativity effectively and equitably.

h. The apparent finding in South Korea that **many people consumed less culture in a period when they had more free time** is surprising and concerning. It is a phenomenon that would repay wider research, to understand it better.

i. During the pandemic there has been growing evidence that **changes in how audiences have come to regard cultural organisations during the pandemic may lead to different kinds of engagement in future** (e.g. Andrew McIntyre[135]). Further research would help us understand these underlying changes, and engage with post-lockdown communities and markets and

customers that may differ significantly from those we thought we knew before the pandemic.

j. There is some US evidence that while **attendance at cultural organisations has dropped during the pandemic, the percentage of attendance by non-recent and first-time visitors has risen.** It would be valuable to know whether that finding is replicated elsewhere in the world, since that could helpfully inform communications strategies for emerging from the pandemic.

k. 30 years after UK Prime Minister Margaret Thatcher notoriously declared there was 'no such thing as society'[136], the pandemic has seen a huge outpouring of **new social and community behaviours**, affirming the value we give to civic engagement in times of crisis. From these human and behavioural standpoints this has been an extraordinary period of changed social behaviour, which needs capturing, analysing and recording before it recedes into memory.

2. **Cultural Leaders**

Amongst all the losses and damage that have resulted from the pandemic, for cultural leaders there have also been new experiences and new learnings that are important to understand in planning for the post-pandemic world. We need to:

a. Recognise the **management and leadership capacities** which consistently proved important during the pandemic – including:

   i. Creative, imaginative approaches to business and financial strategy, with a rational evidence-based approach to analysing and managing risk;

   ii. Confident command of crisis management and communications, effective both in high impact professional judgements and moments of personally bruising individual distress;

   iii. Nimble operational flexibility and versatility;

   iv. Constantly updated digital competencies;

   v. Breadth, consistency and authenticity of communication skills, internally and externally, on all levels and in all contexts.

b. Recognize and retain **other organisational learnings and new practices** that proved beneficial during the pandemic.

c. Recognise how during the pandemic, many previously impermeable and dysfunctional silos were demolished, making way for the development of more collaborative relationships across the CCS. **These unhelpfully rigid historic silos must not be recreated after the pandemic**; rather, the better integrated and networked ways of working must become one of our new normals.

d. Recognise the complexity of the task of **recovering and re-incentivising audiences for in-person cultural experiences after the suspended animation of COVID-19.** It will involve building refreshed, contemporary relationships with the communities we exist to serve, recognising that many people are seeking deeper relationships after the pandemic than mere transactions. Our audiences may not return as we remember them before COVID-19, having themselves been changed by the experience and differing from the audiences we thought we knew before lockdown.

e. Evaluate rigorously the outcomes of each of **the online experiments and discoveries made during the pandemic (both the strategic and the quickly improvised),** as a basis for evidence-based decisions about which to absorb into a physical-online hybrid future, which to evolve in new ways, and which have no place in the post-pandemic world. There are also valuable learnings contained in the many pandemic surveys of consumer responses around the world to the newly developed kinds of online, virtual and interactive culture.

f. Note how the exponential increase in online cultural content has helped drive down some of the costs and technical challenges of producing and distributing content, supporting the diversity and democratisation of cultural expression. **However, the sudden profusion has also made navigation and discoverability more difficult**, both for inquisitive consumers and for producers trying to reach new global audiences. To the extent that the global challenges of online navigation and discovery of content remain unsolved after the pandemic, solutions will need to be found if we are to realise the full potential and viability of the online space.

g. Note how during the pandemic many companies and individual artists have developed technically and organisationally fleet-footed approaches to direct-to-consumers distribution and sales. Those approaches have often proved more efficient than the approaches they replaced, valuable in the consumer data they yielded, and often easier and more convenient for consumers. **These new**

direct sales techniques need careful evaluation, and – where appropriate – absorbing into normal business practice.

h. Remember that for many companies and artists touring was the lifeblood of their work before the onset of COVID-19. During the COVID-enforced interruption of touring, **many cultural leaders have been thinking afresh about their approach to touring -** at a time when cultural leaders generally have been more and more preoccupied with the contribution air travel makes to their carbon footprints, their impacts on climate-change and their sustainability. These fresh approaches to touring may involve replacing daily city-hopping by longer visits to a smaller number of hub centres, offering more meaningful kinds of experiences and deeper relationships with audiences and with other artistic communities. New kinds of artistic residencies and partnerships may then supplant the old models based on incessant long-distance travel. Artistic residencies can engage local communities more deeply than transient arts activities, and arts residencies are likely to play an important role in the post-pandemic reinvention of touring and the emergence of new kinds of national and international exchange.

i. Recognise that one of the most important global communications lessons from the pandemic has been that many governments and public agencies have only a partial understanding of how the CCS works, the kind of support it needs, and the breadth of the return on that investment which it can offer. **The cultural and creative sector urgently needs to create effective and compelling communications programmes addressed to policy makers and political stakeholders.** They need to highlight the importance of the cultural sector to the wider community through a holistic new value proposition for the CCS as a whole[137]. This is not a task that can be undertaken suddenly, from a standing start, in a crisis. It needs consistent, strategically managed, intellectually and politically coherent, high-level communications.

3. Cultural Policy

a. An enormous gulf separates the regions that handled the pandemic with strategic, rational, empathetic skill and evidence-based confidence from those blown randomly to and fro, rudderless, buffeted by all the twists and turns of the pandemic. The latter quickly lost the confidence and trust of their

communities and with it the ability to enlist their support. **The global experience of countering COVID-19 has been a uniquely instructive textbook in distinguishing those crisis-management approaches that work from those that do not.**

b. Some clear pointers are already emerging as to the effectiveness of different public policy tools in supporting a sector like the CCS, with so many different structural models and with such a critical, precarious dependence on freelance, contract and self-employed workers. Of all the issues that will benefit most from cultural policy analysis after the pandemic is behind us, **the different approaches taken by governments to supporting their cultural and creative sectors to ensure their short-term survival and long-term health and sustainable viability will be one of the most important.**

c. Where public support is being targeted at **supporting the reopening or reactivating** of CCS organisations, it needs to include:

   i. The management of the complex logistics surrounding reopening after such an unprecedentedly long shutdown and the communications challenges it presents, learning from the international wealth of studies into audiences' preparedness to return to live culture. These studies contain important data that encourage fresh thinking about how the cultural sector can most strategically position itself for its live return;

   ii. The support which small firms and self-employed workers may need in adapting to post-pandemic structural changes in the cultural ecosystem (e.g., shifts in consumer habits and patterns of cultural consumption), and seizing the new opportunities in those changes;

   iii. The need to rebuild team cultures which have been bruised by the stresses and losses of the pandemic, absorbing lessons from those companies which have already built strong new organisational cultures able to absorb and surmount the challenges of COVID-19;

   iv. New kinds of business modelling and engineering designed to build viable, sustainable, shock-proof business futures for the CCS;

   v. Seed investment to reactivate productions and tours, and fund new productions and events that stimulate supply chain job creation and other linked economic activity;

vi.   The development of collaborative partnerships and networks with other CCS organisations, non-profit and commercial, and enterprises beyond the cultural sector altogether, which together have proved such an important self-help element of cultural responses to the pandemic;

vii.   Culture not just in formal, enclosed spaces, but also free culture animating the public realm, which can play such a powerful role in reconnecting the CCS with the wider community and catalysing urban renewal and community recovery;

viii.   The digital, virtual and online elements of the CCS's work, recognising the central role those elements will play in a future hybrid, integrated global cultural ecosystem, including finding ways to achieve universal access to high-speed broadband.

d.   More generally, ensure that **targeted support programmes for the CCS are built with:**

i.   Absolute clarity (and consistency) around the design of each programme, its purpose and its scope;

ii.   Realism about the necessary duration of programmes if they are to have their full effect, and around the setting of budgetary and revenue qualification thresholds - so that organisations who could benefit from the programmes are not artificially excluded from them;

iii.   Capacity to benefit the whole creative and cultural ecosystem, including support for for-profits, non-profits, volunteer-based organisations and charities – each of which make their own distinctive contributions to the CCS ecosystem as a whole;

iv.   Ability to embrace all the people working in creative and cultural organisations and projects, whatever their employment status;

v.   A combination of programmes - some offering solutions to long-term and structural challenges, others that can show immediate results and which bring immediate relief where it is needed.

e.   One of the lessons of the pandemic has been the way many government innovation strategies and policies are designed around mainstream business and industry, and fail to account for, and therefore fail to harvest, the distinctively innovative DNA at the heart of many parts of the CCS ecosystem.

f. Challenges with zoning, residential regulation, tax structures and other measures that undermine the diversity of artists able to live and work in cities are not new, but the pandemic has thrown them into a new relief. At a time when the vitality of many town and city centres have been deeply impacted by the pandemic, the creativity and the welcoming inclusive energy of artists and cultural creators hold potent keys to restoring life to those urban centres.

g. This is also a moment rich with potential for public authorities to develop new kinds of local strategies for cultural tourism, replacing the environmentally and socially unsustainable practices of many of the old bloated and intensive tourism approaches.

h. Counterpointed against all the damage and destruction of COVID-19, at the same time many communities have seen an outpouring of generous-spirited behaviours between citizens, between communities, and between individuals and public agencies. Given the dangerously seductive, gravitational pull of the imagined security of the pre-pandemic world, there is a real risk that these moments of newly rediscovered community connectivity could be lost. It is vital that we cherish these behaviours, absorbing those fleetingly empathetic individual moments into new kinds of civic expectation and public policy, speaking with new voices that value individual citizens more and bureaucratic convenience less.

4. **Currently underway**
   Many further studies on many of these issues are underway around the world focusing on specific countries or regions or particular parts of the cultural and creative sector. Other studies currently looking at these questions through a wider, more strategic lens include:

   a. **"Shutdown: How Covid Shook the World's Economy"** (Allen Lane) by Adam Tooze, Shelby Cullom Davis Professor of History at Columbia University and Director of the European Institute (named by Foreign Policy Magazine in 2019 as one of the top Global Thinkers of the decade). The book, due for publication in **Sept 2021**, analyses the nature and likely future consequences of the worldwide economic collapse triggered by COVID-19 when for the first time since the second world war the entire global economic system contracted.

b. **Cultural Resilience in the Arts, Culture, and Heritage: A project for the Creative City Network of Canada and its partners**[138], aiming to discover dynamic examples of cultural innovation and to amplify these success stories. Cultural Resilience: Using Innovation to Stabilize in Times of Crisis is a multi-year project of The Creative City Network of Canada in partnership with the Cultural Human Resources Council, Les Arts et la Ville, and the Canadian Commission for UNESCO. Hill Strategies is leading the research for the first phase of this project. Its second phase involves professional development to transmit key learnings to other cultural organizations and artists, aiming to build resilience within the arts and heritage sector. The report release is projected for **late 2021.**

c. **Study by the Department of Culture and Tourism Abu Dhabi (DCT) in partnership with UNESCO.** In March 2021 global culture practitioners met for an online edition of the Abu Dhabi Culture Summit[139]. In opening the Summit, UNESCO's Director-General announced the launch of **a global study on the consequences and learnings of COVID-19** in partnership with DCT[140]: "It will assess the social and economic impact of the pandemic on the culture sector worldwide, map mechanisms, policies, measures and initiatives implemented at national and local level in response to the crisis, and highlight best practices, with a view to developing strategic recommendations for framing national and local recovery policies for the culture sector and beyond." The study is projected to be published **by the end of 2021.**

d. **"Reframing Creativity[141]",** a research project funded by an Insight Grant from the Social Sciences and Humanities Research Council of Canada and additional funding from Ryerson University, conducted by David Gauntlett (Canada Research Chair in Creative Innovation and Leadership), Ramona Pringle (Director of the Creative Innovation Studio, and multiplatform producer/artist) and Valeria Duarte (Researcher and Project Manager at the Creativity Everything Lab), all based in The Creative School at Ryerson University in Toronto, Canada. The project studies how creators were affected by the global outbreak, how they pivoted when their work dynamics were disrupted by the new norms and regulations, how they navigated their creative self-identity in a moment of unprecedented strain, and how we can be better prepared for similar future crises. This multi-year investigation has a variety of channels and strategies designed to disseminate its findings including a website and social media platforms, and the production of various publications stemming from the project over the period of **late 2021 to 2024.**

e. **Culture + Community in a Time of Transformation**[142]: A Special Edition of **Culture Track**[143] - an American national research and strategy project to keep the cultural sector in dialogue with its communities and participants during the pandemic, aiming to inform deeper equity and justice. Wave 2 of the national survey was distributed by 500+ US. cultural organizations and also to a representative sample of the US population. The 2021 survey repeated some of the questions in the early-pandemic 2020 version as a comparator. The qualitative report (narrative by Slover Linett, strategy summary by LaPlaca Cohen) is projected for publication in **October 2021.** The quantitative report (narrative by Slover Linett, strategy summary by LaPlaca Cohen) is projected for publication in **November 2021.**

f. **"Creative Industries and the COVID-19 Pandemic"**[144], a European perspective to be published by Routledge in **early 2022**, edited by Elisa Salvador (Professor of Innovation and Creativity at ESSCA School of Management, France), Trilce Navarrete (Lecturer in Cultural Economics at the Erasmus University, Netherlands) and Andrej Srakar (Scientific Associate at the Institute for Economic Research and Assistant Professor of Economics and Business at the University of Ljubljana, Slovenia). Focussing on European countries and taking into account the evolving and unstable context dictated by the pandemic being still in progress, this book investigates first reactions and strategies of CCS actors, government bodies and cultural institutions and the potential consequences of these emergency strategies for the future of the CCS.

g. **Pandemic Arts Consumption—An International Analysis.** TRG Arts (US) and Purple 7 (UK) partnered at the beginning of the pandemic (April 2020) to aggregate and study arts consumer behaviour before and during the pandemic, to help arts and cultural executives put their trends in peer context. Free to join, the COVID-19 Sector Benchmark provides insight to more than 600 organisations in the US, Canada and the UK and more join daily[145]. In **the first quarter of 2022** TRG Arts will provide an analysis of the cumulative data and insights about its meaning to the recovery of arts and culture in the countries the company serves.

h. **2021 Performing Arts Ticket Buyer Media Usage Study** - The Performing Arts Ticket Buyer Media Usage Study[146] surveying North American cultural organisations is designed as a resource for arts marketers in organizations of all kinds and sizes to navigate ever-evolving audience behaviour in today's rapidly changing media environment. The 2021 study will be released in **early 2022** and will feature insights on the social media platforms and print and online news sources patrons are

currently relying on most, which devices they use most, and what sources are most influential in helping them learn about and decide to attend performing arts events. This iteration of the study also seeks to shed light on the differences, if any, between virtual and in-person attenders.

i. **Return to the Stage: A Performing Arts Workforce Study,** a US study jointly developed by David McGraw (Program Director in Arts Administration, Elon University) and Meg Friedman (Consultant and Knowledge Manager, AMS Planning & Research). It examines the employment status, emotional well-being, pandemic coping strategies, cultural sector confidence, and likely attrition among performing arts workers across technical, administrative, and artistic occupations, comparing the responses of over 5,000 self-selected survey respondents to the general US population as well as a longitudinal study of a subgroup of volunteers. Surveys in July 2020, January 2021, and July 2021 confirm reports of fractured communications between employers and workers, and disproportionately elevated emotional distress among performing arts professionals during the pandemic. Initial findings are featured by the Association of Performing Arts Professionals with full analysis in process for peer-reviewed publication **during 2022**.

j. **The Creative Leader During a Global Pandemic** - in 2022 Jill S. Robinson, CEO of TRG Arts will report on aggregated findings from her cumulative experience with chief executives in arts and culture during the pandemic. TRG's response began in March 2020 and included more than 500 chief executives in the US, Canada and the UK in a variety of client and workshop settings, as well as its weekly TRG30 series[147] which continues into 2022. The sessions were designed to help leaders use the pandemic as a catalyst for the major change needed to ensure a fully resilient future, and the final report **in 2022** will analyse those experiences and provide insights about needs for cultural leadership moving forward beyond the pandemic.

Envoi

Writing this study in April-July 2021 (when many communities are still mired in the pandemic) this can only be an interim exercise. The pandemic has a long while yet to run, and emergence from the era of COVID-19 will be a slow, transitional process rather than a flipped overnight switch. The aching Prisoners' Chorus from Beethoven's opera Fidelio, their own ode to freedom as they emerge blinking and hesitant from their Stygian dungeon into daylight, feels a better metaphor for our eventual emergence from Covid than anything like Freedom Day.

The pandemic will slowly reduce, in both its incidence and its deadly effects, and prudent governments will release their protective and emergency support measures in the same slow, measured rhythm. Cultural communities in different countries will experience that release at different times and at different speeds. In marking this moment in time, when we are just starting to see enough lessons for it to be practicable to try and capture them, I hope to have contributed something of value to my friends and colleagues responsible for leading cultural institutions. It would be rash impudence to claim anything more for this study, but I offer it in that constructive spirit.

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In the last week of April 2021 I reached out to colleagues in eight international networks and thirty countries around the globe, asking them about experiences of the pandemic and its effects local to them. Within two months I had received a mountain of fulsome replies and information from the following 22 international organisations and 93 individuals in North and South America, Europe, Asia and Australasia:

AMS Planning and Research

Andrew W. Mellon Foundation

Association of Asia Pacific Performing Arts Centres (AAPPAC)

Association of Performing Arts Professionals (APAP)

British Council

Canada Council for the Arts

Culture Action Europe

Culture Research Network (CRN)

CUPORE – the Finnish Foundation for Cultural Policy Research

Department of National Heritage, Canada

European Concert Hall Organisation (ECHO)

European Union National Institutes for Culture (EUNIC)

Global Public Affairs

International Federation of Arts Councils and Culture Agencies (IFACCA)

International network for contemporary performing arts (IETM)

International Society for the Performing Arts (ISPA)

KEA (culture and creative industry policy)

Mercado Común del Sur (MERCOSUR)

Nanos Research

National Endowment for the Arts

Network of European Museum Organisations (NEMO)

Purple Seven

Target Resource Group (TRG Arts)

United Nations Educational, Scientific and Cultural Organization (UNESCOUnited Nations Educational, Scientific and Cultural Organization (UNESCO)

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