Plymouth Culture

COVID-19 survey

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Contents

About this report

This report presents the results of a e-survey offered to arts and cultural organisations and practitioners in Plymouth.

The research aims to discover the impact that the COVID-19 crisis has had and will continue to have on the cultural sector in Plymouth, in order that Plymouth Culture can help organisations and practitioners weather the storm, for the good of Plymouth as a whole.

Respondents

In total 114 responses were received. Of these, 83 were complete responses and 4 were incomplete but with at least half questions answered, including COVID-19 specific questions. 37 responses were from interviews which were terminated less than half way through the e-survey. This gives a working sample size of **87 organisations**.

Data cleaning

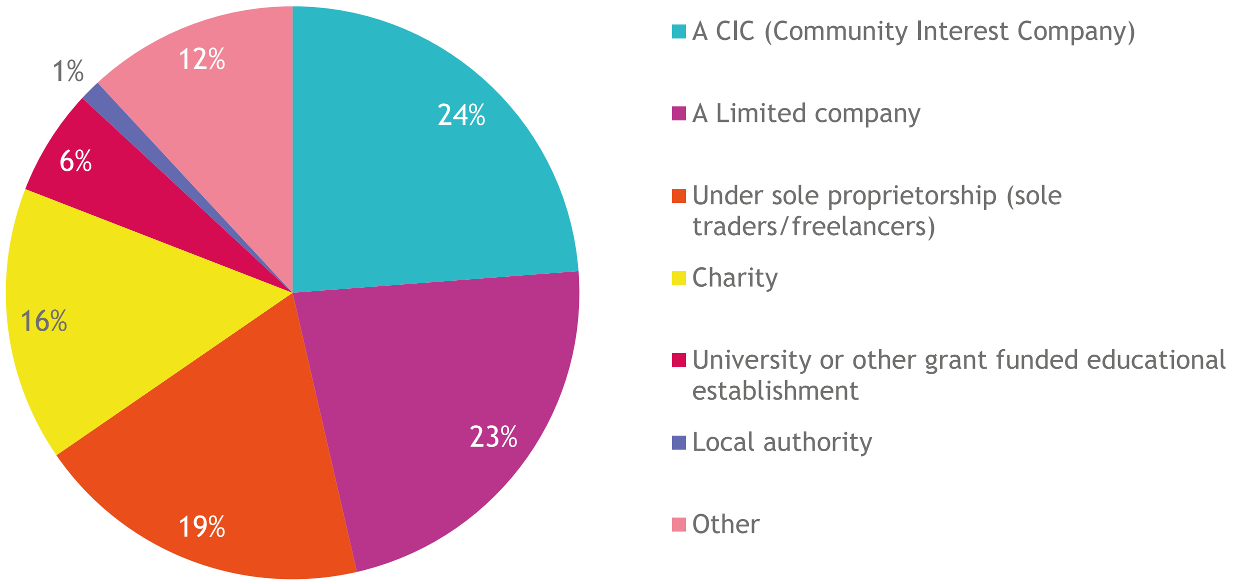
The data included some duplicates (where more than one response was receive from a single organisation) and incomplete cases (were the survey was terminated before the 'Submit' button was clicked). Incomplete cases have been included in the analysis where enough data was collected to be of use. Where duplicates were found, the more complete response was used, or if responses had similar amounts of data they were consolidated into one single case per organisation as follows:

- Different values: mid-point/average of values taken, unless values refer to different parts of overall offer in which case they are combined
- Multiple response options: responses from each case combined
- Single response questions: most recent response used
- Literal/open questions: data combined, with responses delimited with "//"

All responses are available in the raw data file, including incompletes and duplicate cases which were either superseded or merged.

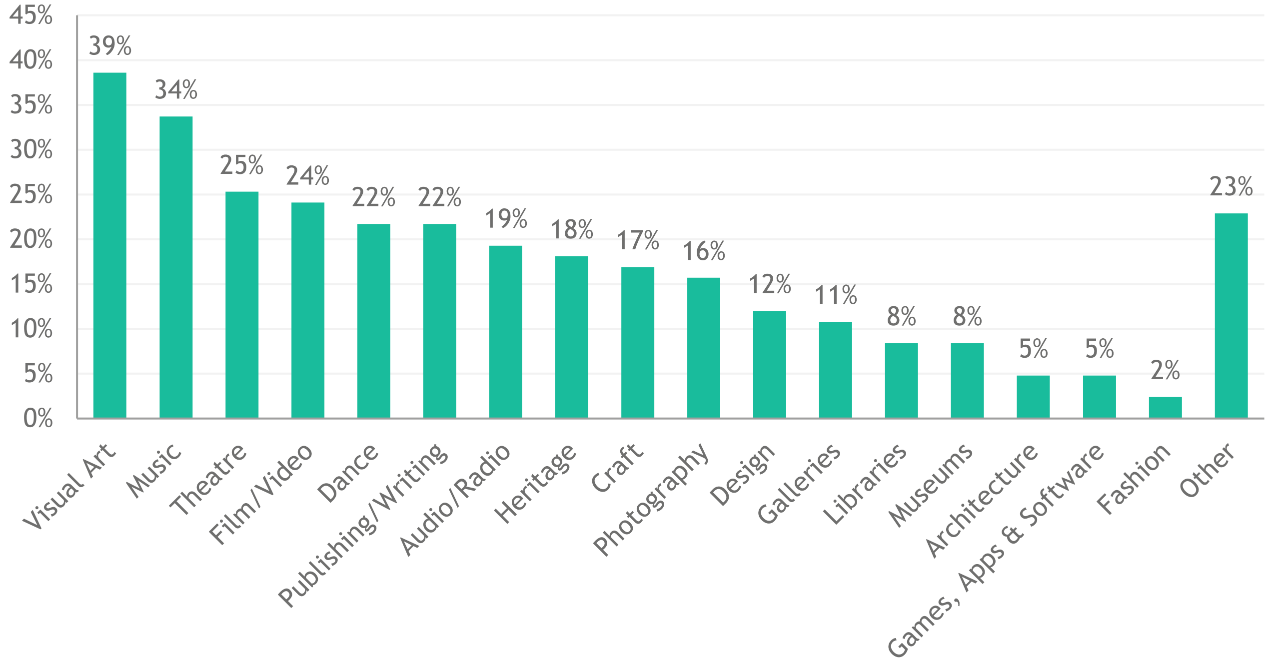
The raw data file also includes some new variables, created to correct inconsistencies in use of percentages and counts. In these cases, the original responses are also given but the corrected versions are used in this analysis.

Organisation type



Base: 84 organisations

Sector/artform



Base: 83 organisations

Public-facing and B2B activity

79% of organisations provide cultural services, events or opportunities to the public. These activities span a broad range of engagement, including workshops, exhibitions, concerts, festivals, education, and training.

The 50 organisations who provided figures on this score had a **combined audience of just over one million people**[1] in 2018/19. On average, **94% of audience members at each organisation were resident in Plymouth**.

[1] This figure may include repeat instances of engagement from individuals *within* and *between* organisations

What cultural services, events or opportunities do you provide to the public?

Base: 60 organisations

45% of organisations provide cultural services, events or opportunities to other organisations. These services include workshops, business support, training, consultancy, technical services, PR and marketing, artist development, commissions, and project delivery.

Respondents worked with a total of **753 organisations** in 2018/19 (across the 30 organisations who provided figures), an average of 25 per organisation who provide such services. For the average respondent, 79% of these businesses were based in Plymouth.

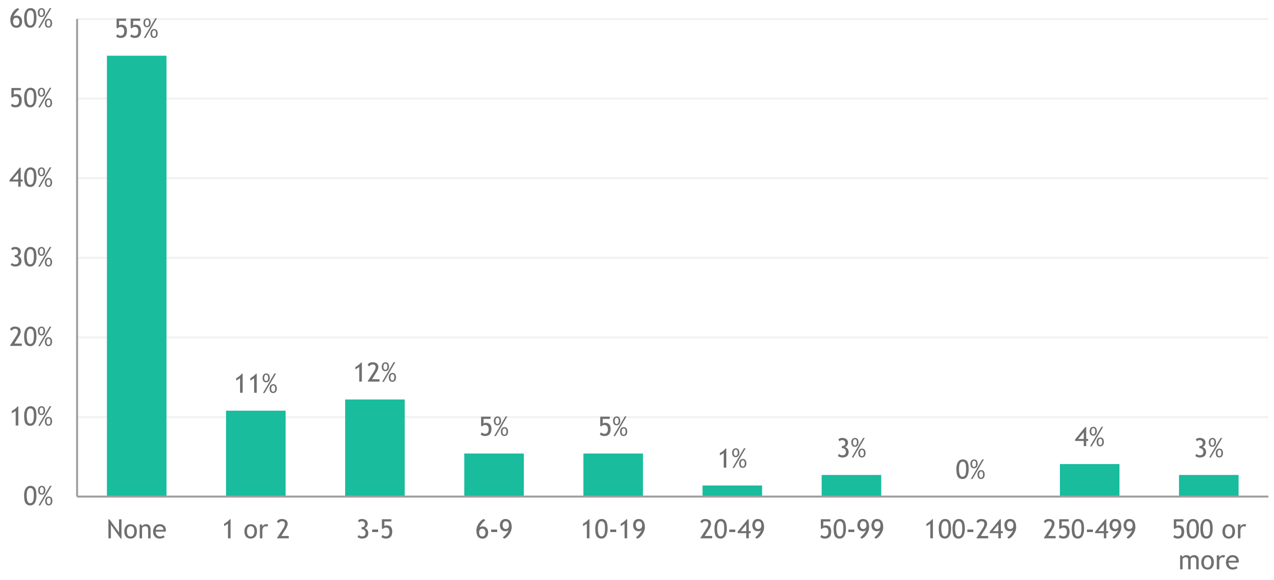
What cultural services, events or opportunities do you provide to other organisations?

Base: 32 organisations

Employees

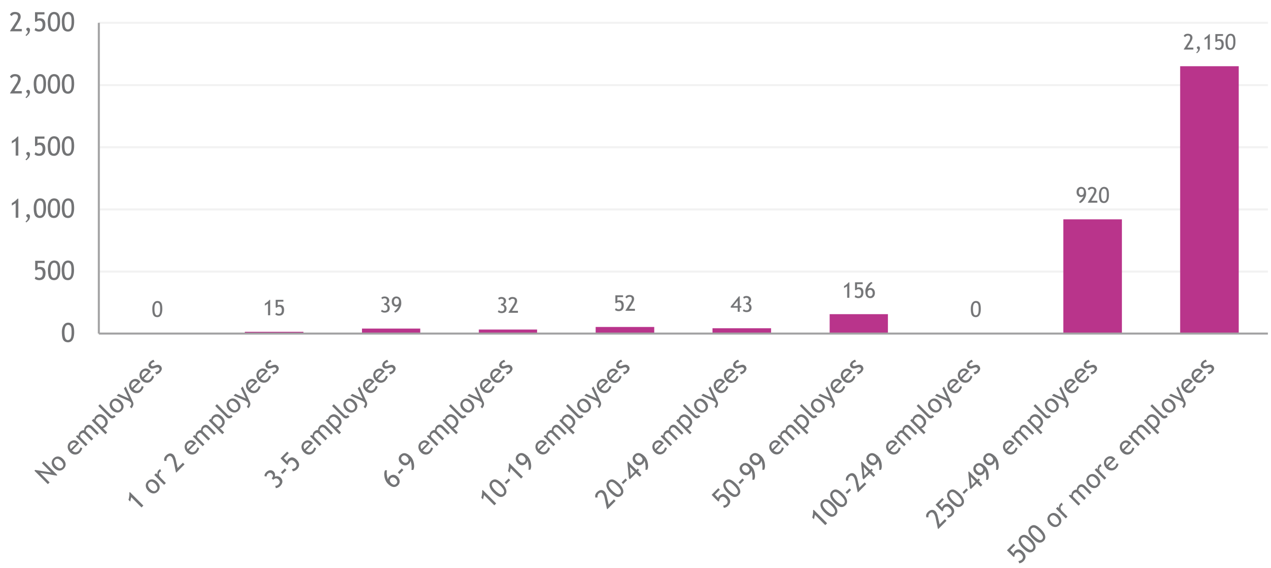
3,407 people are employed by the 74 organisations who provided data on this measure. This ranges from no employees (i.e. where the organisation is a sole trader) to 1,500 employees. Amongst the minority of organisations which *do* have employees, most have fewer than six. A majority of the combined workforce is therefore employed by a small minority of large organisations, with the five largest organisations accounting for 3,070 employees – or 90% of those across the 74 organisations who provided employee data.

Number of employees per organisation



Base: 74 organisations

Total number of people employed by organisations of each size

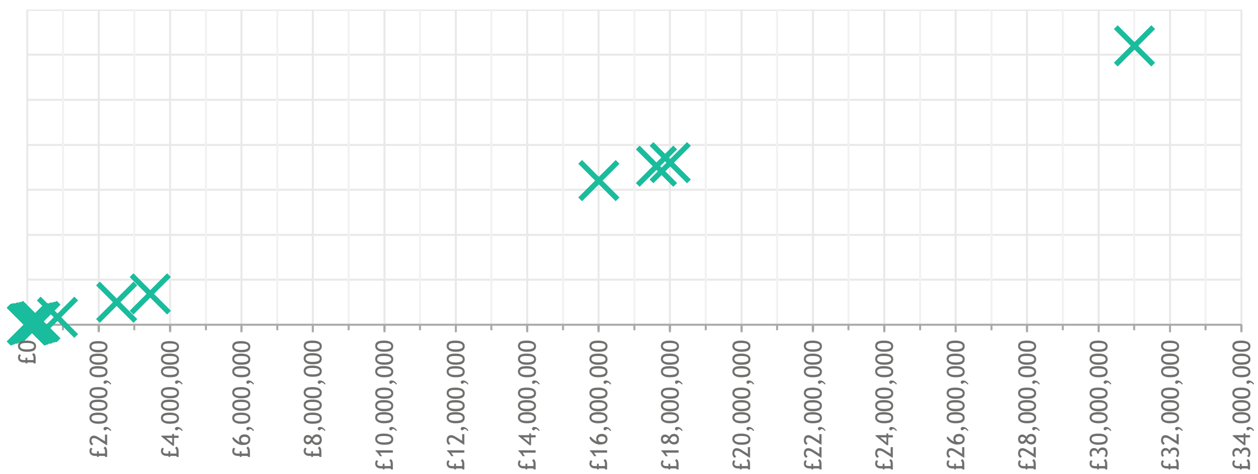


Base: 74 organisations

Income and funding

Across the 61 organisations who provided a figure, yearly incomes for 2018/19 ranged from £250 to £31m. The average (mean) income was £1.5m, pulled up by a small number of very high incomes; the median income was £70,000 – that is to say, half of organisation who provided data on this measure had an income of less than £70,000, half more than £70,000.

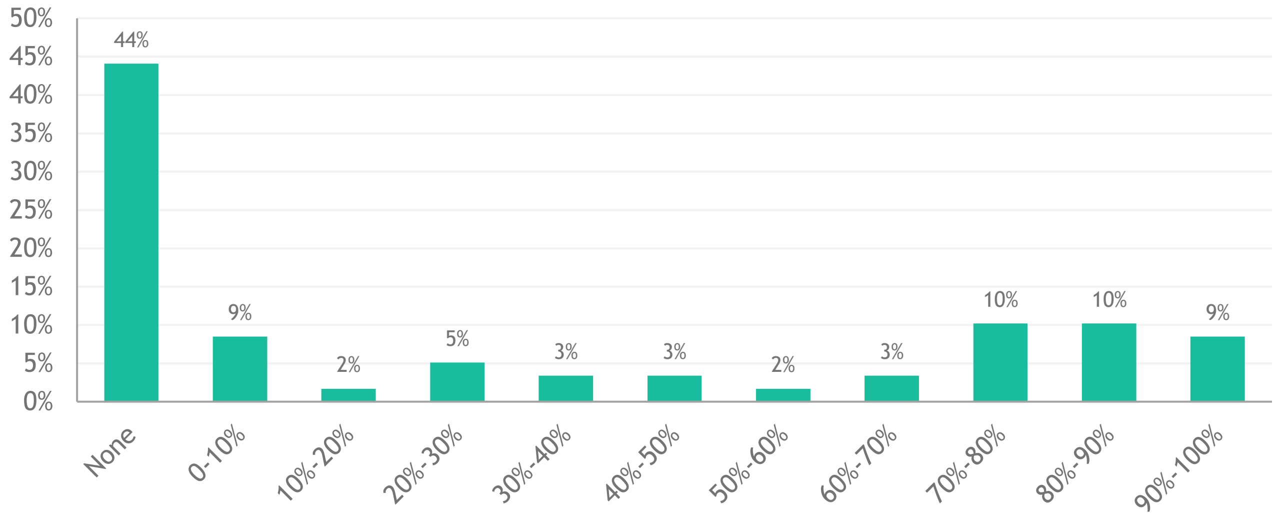
Income distribution



Base: 61 organisations

Most of the organisations who responded to the survey didn't received little or no public or grant funding in 2018/19, however for around one third this income accounted for more than half of their income, and for 11 of the 59 organisations who provided data public funding or grants made up over 80% of their income.

2018/19 Income from public funding/grants



Base: 59 organisations

Across all 59 organisations, public funding or grants accounted for around £36m of income in 2018/19. This is largely due to a small number of organisations receiving the majority of the funding, with the median amount in 2018/19 being just £1,400.

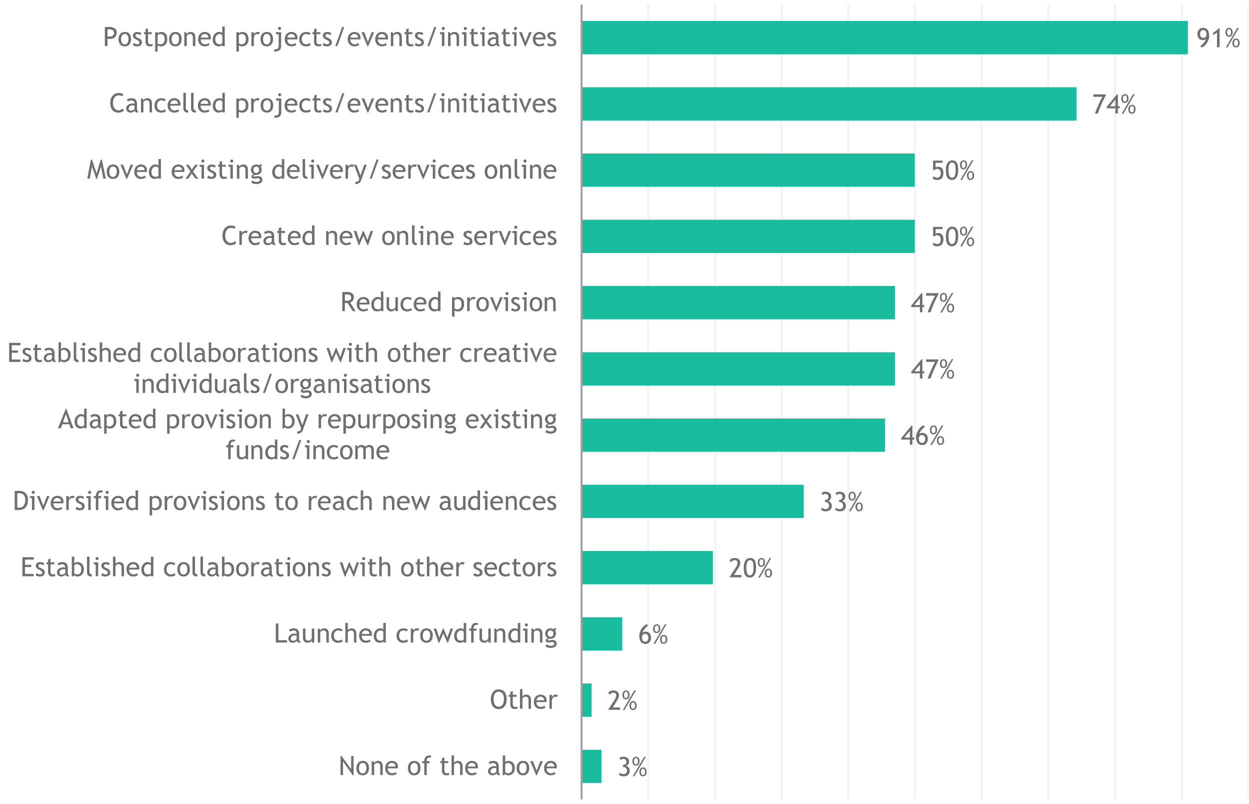
Early impacts

Ways of working

Almost all organisations who responded to the survey have made some changes to the way they operate due to COVID-19. The **majority have postponed or cancelled projects, and/or moved to online delivery**, and significant proportions have reduced their levels of provision. Almost half have established collaborations with others within the sector, one in five with organisations outside the sector, and a third have diversified their activity to reach new audiences.

At the time of the survey, only a small minority (11 respondents) had used crowdfunding or launched an emergency appeal.

What changes have you made to date to the way you operate as a direct result of COVID-19?

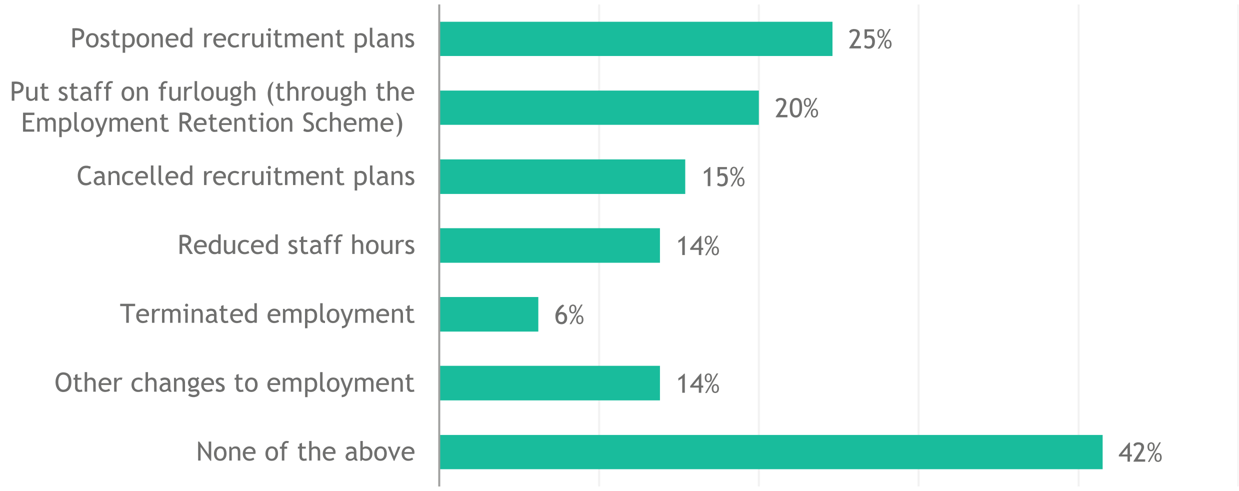


Base: 66 organisations

Staffing

At the time of the survey, **over half of responding organisations had implemented a change to their staffing or recruitment**. One in four had postponed or cancelled recruitment plans, one in five had used the Employment Retention Scheme, and one in six had reduced staff hours.

What impact has COVID-19 had on your staffing decisions to date since social distancing and lockdown measures were introduced on the 23rd of March?



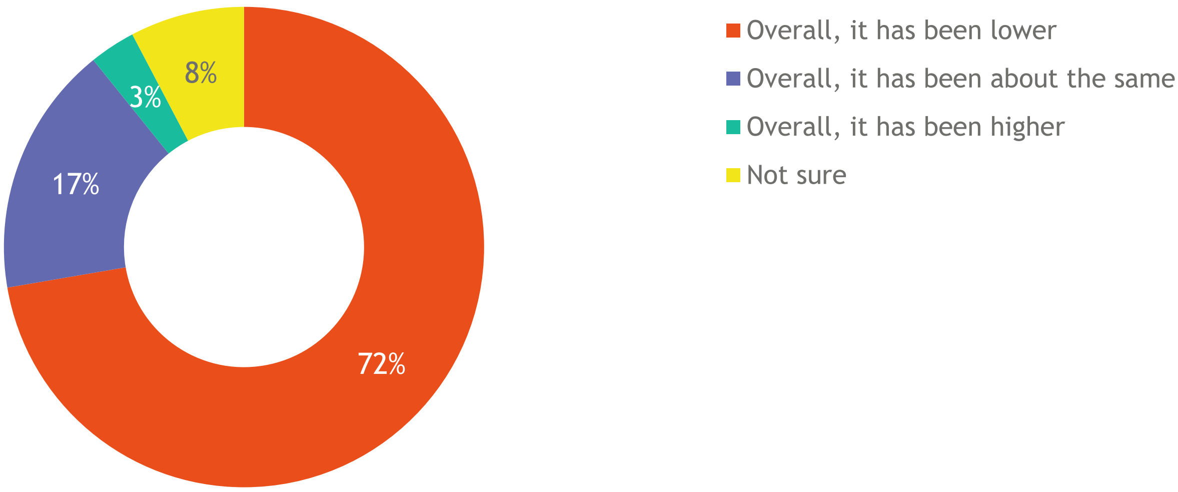
Base: 65 organisations

Other changes included voluntary working, offering less work to freelancers, redeployment, and investigating redundancies.

Income

At the time of the survey, social distancing and other lockdown measures had had a negative impact on around three quarters of responding organisations' income. One in six had not (or not yet) felt an impact, and one organisation reported higher income over this period.

What impact has COVID-19 had on your income to date since social distancing and lockdown measures were introduced on the 23rd of March until now?



Base: 65 organisations

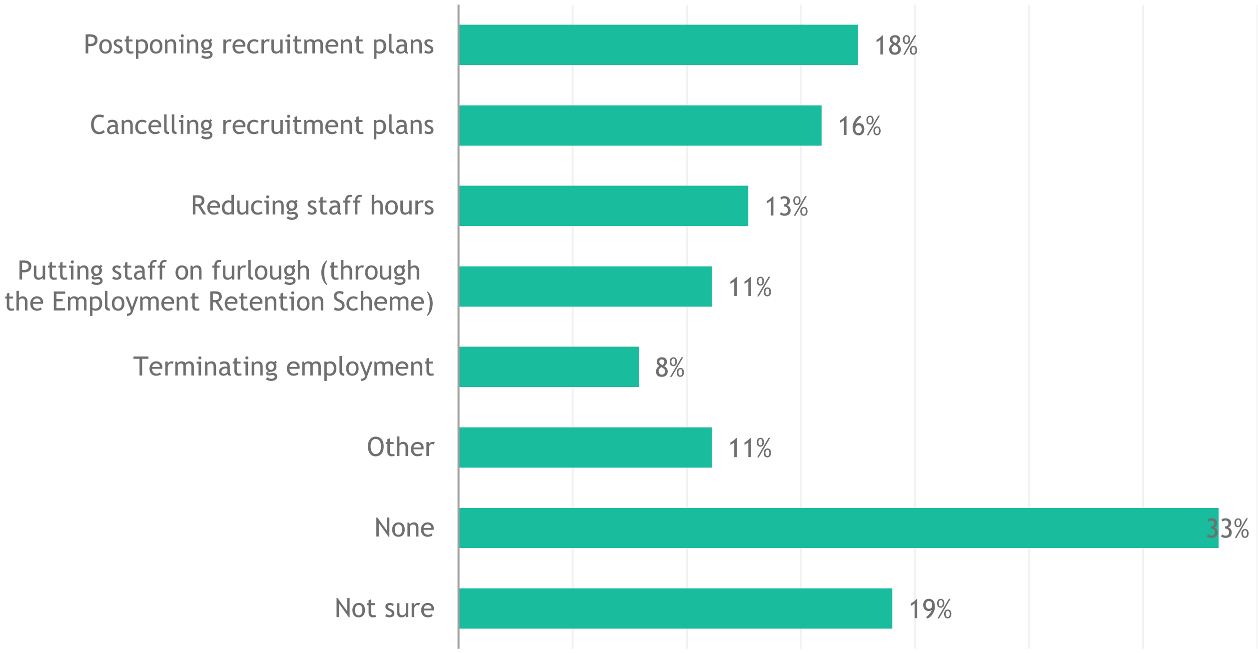
The extent of this reduction in income varied amongst organisations, from a total reduction (i.e. no income since March 23rd) to a 20% increase. On average, organisations experienced a **56% decrease in income in the period from March 23rd**.

Future impacts

Staffing

Looking forward over the next 12 months, around half of organisations felt they would have to, or continue to, make changes to staffing, including postponing or cancelling recruitment, reducing hours, using the Employment Retention Scheme, or terminating employment. A third felt they would not make any changes beyond those they had already enacted.

Which changes in employment do you plan on making over the next 12 months, if COVID-19 continues to impact daily life?



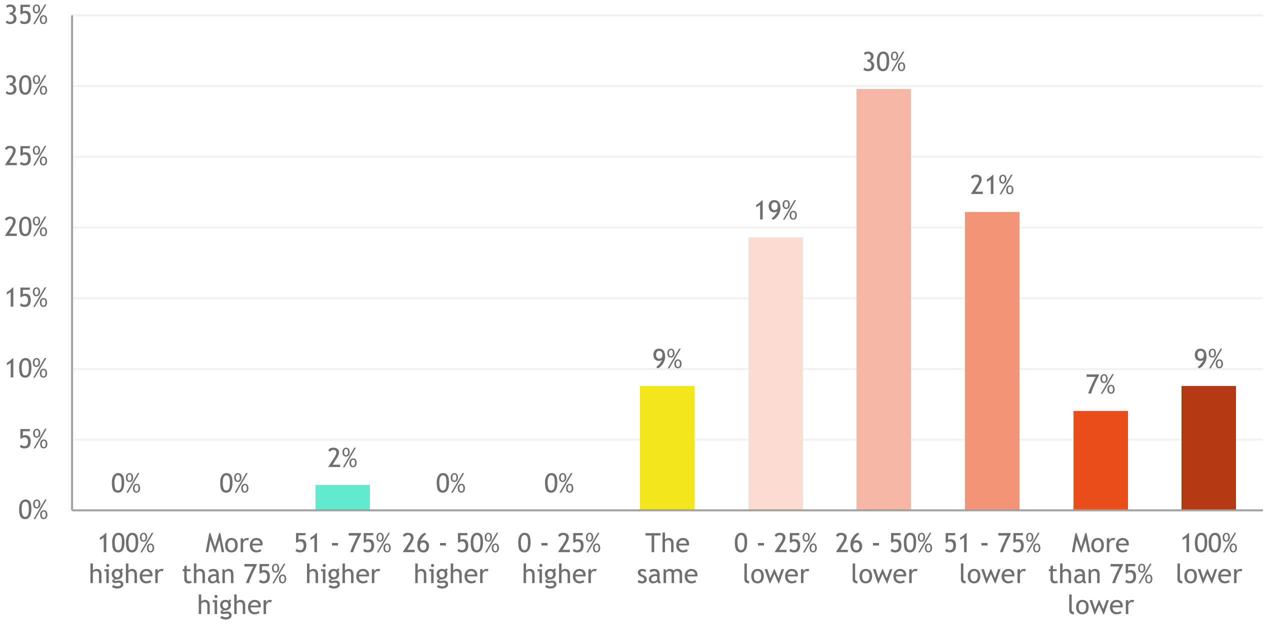
Base: 63 organisations

Other planned changes include closing the organisation, reducing numbers of volunteers, and waiting to see the options the government provides.

Income

Four out of five organisations expect their income over the next 6 months (roughly June-November 2020) to be lower compared to a normal operational year, with an **average anticipated decrease of 42%**[2].

In percentage terms, approximately how much higher/lower do you think [your income in the next six months] will be?

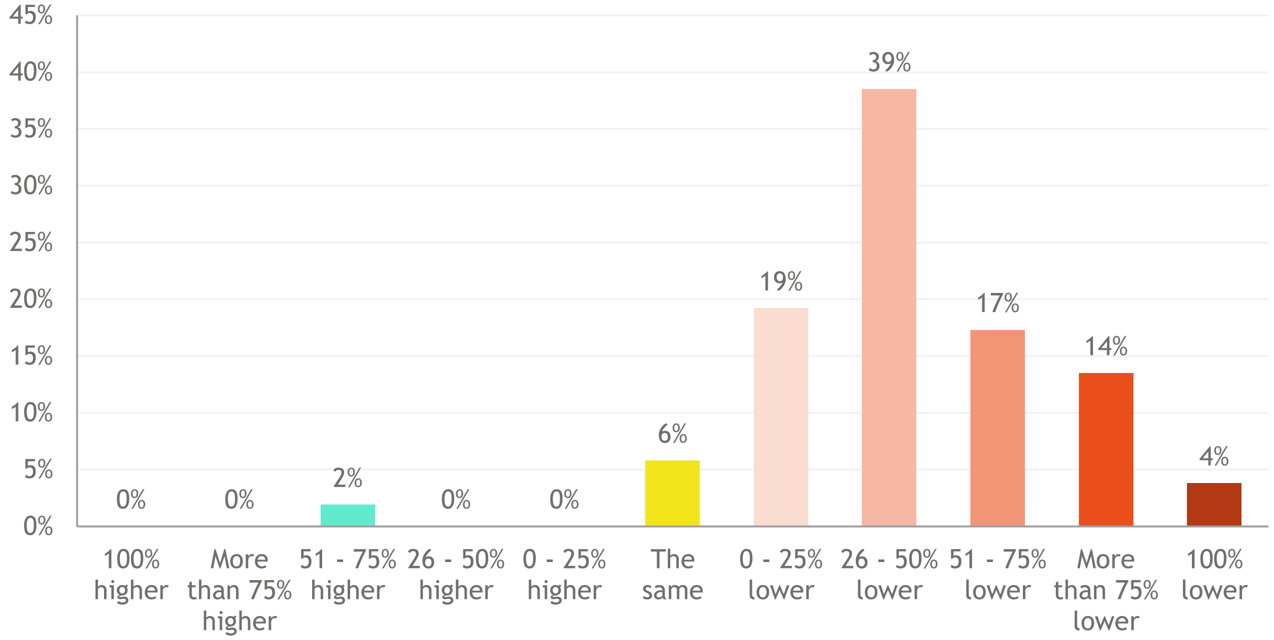


Base: 55 organisations

It's a similar picture over the next 6-12 months (approximately December 2020-May 2021), with 82% of organisations expecting lower income over this extended period, compared with usual levels of income. Organisations again on overage expected to see a **reduction of 42%** over this period.

[2] This is based on taking the mid-point of the chosen percentage range as a proxy for actual anticipated change in income. For example, an organisation choosing "26-50% lower" would be assigned a value of minus 37.5%)

In percentage terms, approximately how much higher/lower do you think [your income in the next six to twelve months] will be?



Base: 52 organisations

For organisations where we're able to compare known income in 2018/19 with anticipated income over the next 12 months in full, we see an **overall fall of £17.3m income**, from £77.2m in 2018/19 to an anticipated £59.9m in the year to May 2021. For some organisations this fall won't be as great (and two organisations anticipate an increase), but the majority of organisations expect to see a significant fall in income.

When we look at the same figures but not including educational institutions, the results are:

Total 18/19 income amongst responding organisations = £46.2m

Anticipated 20/21 income = estimated £32.8m

Change = estimated £13.4m (-29%)

Base: 52 organisations

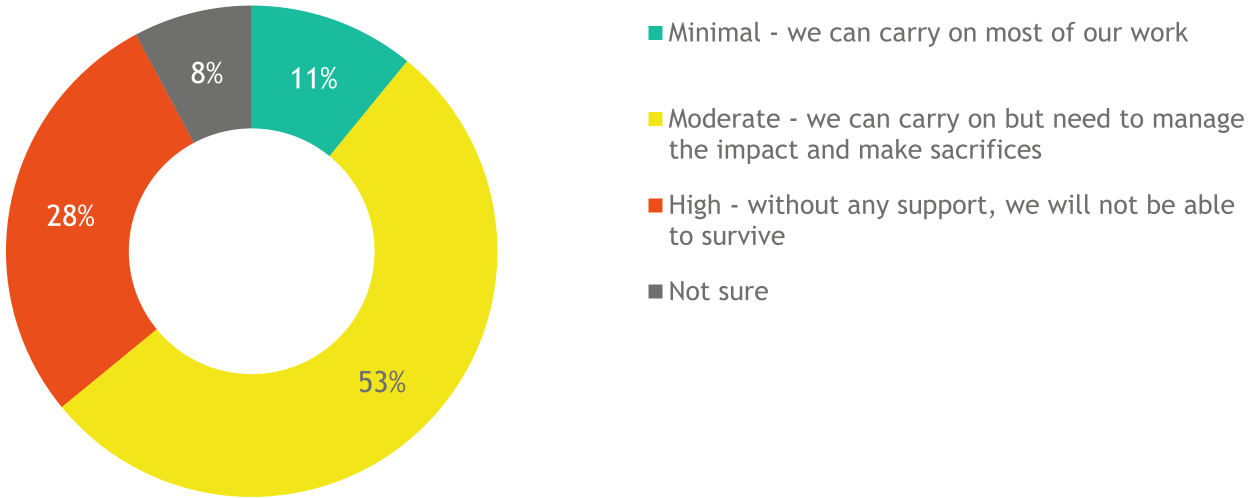
Recovery and support

Additional/continued support

Around one in ten organisations surveyed report that the COVID-19 crisis carries minimal levels of risk for their practice, business or organisation. Eight out of ten reported either moderate or high risks, and around one in ten were not sure yet.

Just over half of the organisations anticipate they will be able to continue without additional support, but there would be an impact on their activity if this was the case. For 28% the risk is high – without additional support they will be unable to survive.

Without additional support (financial or otherwise), what level of risk does the COVID-19 crisis pose to the viability of your practice/business/organisation over the next 12 months?



Base: 64 organisations

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