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# DUNDEE → CULTURAL RECOVERY →

**2021**  
**A Policy Report**  
**Dr Lauren England**

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# Contents

Tables and Figures .....	3
Foreword .....	4
About the author .....	5
1. Executive Summary .....	6
2. Introduction .....	13
3. Methodology .....	15
4. Key Findings .....	19
5. Spotlight on Freelancers .....	39
6. Spotlight on Cultural Strategy .....	42
7. Dundee Cultural Recovery:	
Recommendations for an ecosystem approach .....	46
Acknowledgements .....	49
References .....	50

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# Tables and Figures

Table 1 Dundee's cultural workforce 2019/20 and 2020/21.....	21
Table 2 Income and Funding 2019/20.....	22
Table 3 Income and Funding 2020/21.....	23
Table 4 Estimated income change due to Covid-19.....	24
Table 5 Visits and public events in 2019/20 and 2020/21 .....	27
Table 6 Location of delivery of public activity in 2019/20 and 2020/21 (estimated %).....	28
Table 7 Digital engagement 2019/20 and 2020/21 .....	28
Table 8 Outreach and education participants recorded by age group in 2019/20 and 2020/21.....	30
Figure 1 response to question 'Which of the following creative sectors do you work in?'.....	17



**“Our shared ethos for the sector, and Dundee as a whole, is a commitment to social justice and a commitment to equality and a commitment to working together in partnership to be absolutely more than the sum of our parts. [...] those values and principles underpin everything that we do from the very first policy and strategy through to the recovery strategy.” - Cultural Development Group member**

## Foreword

The Dundee Cultural Partnership is delighted to publish the findings of this collaborative research project, led by Dr Lauren England and supported by an Impact and Innovation Development Fund (2021) from the University of Dundee. The project enriches our understanding of the impact of the pandemic on the organisations and freelancers who make up Dundee's cultural economy and the role of policy in supporting the city's cultural recovery.

The findings highlight the significant contribution and performance of the cultural and creative sector prior to Covid and outlines a critical pathway for recovery. The recommendations outlined in the report recognise the importance of an ecological response to recovery, the need to support creative workers as part of the cultural economy, and the importance of collective action. The establishment of a clear infrastructure underpinning the Cultural Development Group, specifically coordination and communication, is also critical.

The findings of the research link closely with the City's Recovery Plan, which proposes a multi-agency response to recovery through the Dundee Partnership and the development of a refreshed City Plan.

The Cultural Partnership recognises and embraces the many ways in which the sector supports the priorities of the City in delivering services and ambitions which help address inclusion, health, attainment and quality of life. By implementing the recommendations of the report we will support social recovery and community involvement.

We are very grateful to Dr Lauren England for working with us and producing this report.

**Judy Dobbie**  
**Director of Leisure and Culture Dundee**



## About the author

Dr Lauren England is a Lecturer in Creative Economies at King's College London, UK. In 2020-21, while conducting this research, she was a Baxter Fellow in Creative Economies at the Duncan of Jordanstone College of Art & Design at the University of Dundee, UK. Dr England is interested in creative enterprise and education with a focus on craft and design economies and sustainable development in both global North and global South contexts. She has published research on the craft economies, creative economy development in Africa and the impact of COVID-19 on creative workers. She is currently researching the impact of COVID-19 on creative economies.

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# Executive Summary

**This report presents key findings from the ‘Dundee Cultural Recovery Project’. The project aimed to generate insights into the impact of the pandemic on the organisations and individual cultural workers (specifically freelancers) who make up Dundee’s cultural economy and the role of policy in supporting the city’s cultural recovery. The research builds on the work of the Cultural Development Group of the Dundee Partnership and findings will directly feed into the Covid Recovery Plan being developed by the Cultural Development Group.**

The project was a collaboration between the Duncan of Jordanstone College of Art & Design at the University of Dundee, Leisure & Culture Dundee and Dundee City Council Events Team. The research was led by Dr Lauren England (University of Dundee). The research was supported by an Impact and Innovation Development Fund (2021) from the University of Dundee. With the support of Culture Counts, this report was designed by Jamie Stein, a freelance graphic designer based in Dundee.

Key findings are drawn from a survey of 19 cultural organisations in the city and focus groups and interviews with 26 cultural sector stakeholders (representatives of cultural organisations including members of the Cultural Development Group and creative freelancers).



## Workforce

In the 2019/20 financial year nearly 700 jobs were reported across 19 organisations. In the 2020/21 financial year, the total jobs reported fell by 21% to nearly 550. The reduction in employment includes only a small reduction (-4%) of employees, reflecting the use of job-retention scheme (furlough). Freelance/contract staff reduced at a higher rate than employees (-34%). It was noted that freelancers were changing career paths or considering leaving the sector out of necessity due to the loss of employment and income.

447 volunteers and 35,653 hours of volunteering were recorded in 2019/20. Volunteering was heavily reduced in 2020/21, with a -56% reduction in volunteers and -48% reduction in recorded volunteer hours.

The survey indicated limited provision of work-based training opportunities both in 2019/20 and 2020/2021. Findings show particularly low numbers of paid placements, internships and apprenticeships.

.....

Nearly  
**700**  
jobs in 2019/20

.....

.....

**-21%**  
jobs in 2020/21

.....

## Finance

In 2019/20 the total income reported by 15 organisations was over £14.1m. About half of this was 'earned income' (over £7.3m) and 'public funding' accounted for around £6.4m.

In 2020/21, 11 organisations reported a total income of over £12.76m, with a significant fall in earned income to around 900k<sup>2</sup>. This shortfall was partly covered by an increase in public funding which accounted for around £9.8m. Funding levels in both years varied dramatically between organisations, highlighting the diversity of scale in the organisations represented in Dundee's cultural sector but also the variety in their experience of the financial implications of the pandemic. The majority of organisational respondents reported receiving some form of Covid-relief funding, but 5 organisations indicated they had not received any specific relief funding.

.....

**£14.1m**  
income in 2019/20

.....

.....

Earned income  
fell to  
**900k**  
in 2020/21

.....

<sup>2</sup> Data provided by 10 organisations



**1.7m+**  
visits in 2019/20

Nearly  
**4,800**  
public events  
in 2019/20

**3,084**  
outreach & education  
sessions in 2019/20

**-91%**  
venue visits  
in 2020/21

**-81%**  
public events  
in 2020/21

**-83%**  
outreach & education  
activity in 2020/21

## Engagement

In 2019/20, over 1.7million visits to venue-based organisations, nearly 4,800 public events and close to 680,000 attendances were reported, highlighting the extent of activity and engagement prior to the pandemic. Between 2019/20 and 2020/21 reported visits to venues reduced by 91% and the number of public events reduced by 81%.

While some organisations moved events online, the survey and focus groups indicated that this was not possible for all organisations due to the nature of the event/the work or the capacity of staff.

In 2019/20, it was estimated that 94.5% of public activities took place in Dundee. In 2020/21, it was estimated that just over 34% of activities took place in Dundee, and online delivery increased to nearly 66%.

58% of organisational respondents reported representation on advisory groups, boards or committees locally, nationally and regionally.

Over 1,900 support/professional development sessions for artists and creatives were delivered in 2019/20. The number of sessions reduced by 96% between 2019/20 and 2020/21.

In 2019/20, organisations reported delivering 3,084 outreach and education sessions, with over 147,000 participants (including children and adults). In 2020/21, the provision of outreach and education activity fell by 83%, with a 95% fall in participation.

The cancellation of learning and outreach activity had a significant impact on the income of creative freelancers. Although some activity moved online and larger organisations developed new engagement activities, this was not possible for a lot of organisations and individuals.

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## Wider Covid impacts

In response to the pandemic, organisations and individual freelancers had adapted their business models, funding streams and operating structures. Organisations reflected that this represented both a short and longer-term diversification strategy in response to changing markets. Several organisations noted a shift towards “core business” and recovery, sometimes with associated cuts to staff and budgets. More positively, this could also provide opportunities for greater reflexivity and strategic (re)direction. Some organisations also adapted content and delivery to online platforms and built this into revised business models, resulting in some new content creation and audience engagement. The move to digital also created a greater demand for digital skills and there were capacity and financial constraints here.

“ **Some organisations also adapted content and delivery to online platforms and built this into revised business models, resulting in some new content creation and audience engagement.** ”

Concerns were raised across the cultural sector about both the short and longer-term impact of the pandemic on staff (numbers and capacity), skills (level, specialisms, availability) and finances (budget cuts, additional costs, availability of future funding). This was exacerbated by high levels of ongoing uncertainty (financial and regarding restrictions, audience/consumer response and future trajectory of the pandemic). Such uncertainty, particularly financial (reflecting current or future employment precarity), fluctuations in restrictions and changes to organisational practices, was also articulated as putting additional pressure on staff. The need for stability and clarity was prominent. There was also a strong sense of responsibility and duty of care for staff/colleagues, freelancers and the wider community.

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## Spotlight on Freelancers

Freelancers taking part in the focus group emphasised the impact of the cancellation or postponement of contracts and a significant or complete reduction in their income generated from creative and cultural work. Some had or were currently considering leaving the sector and knew others who had already left. While this has severe consequences for individual freelancers, it also has a damaging effect on the wider sector and the workforce supply chain. Freelancers also reported negative relationships and contractual arrangements with larger cultural organisations during the pandemic. Furthermore, freelancers discussed how informal negotiations were taking place with organisations with requests to reduce payments or add work to existing projects without additional compensation. Falling through the gaps in (national) financial support schemes and the impact on their livelihoods was another key feature of the discussion. The emotional impact of applying for “hardship” funding was also highlighted. The pandemic was seen to exacerbate precarity and divisions between PAYE employees and freelance creative workers and between creative and non-creative workers.

“ **Some freelancers had or were currently considering leaving the sector and knew others who had already left. While this has severe consequences for individual freelancers, it also has a damaging effect on the wider sector and the workforce supply chain.** ”

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## Spotlight on Strategy

Strategy development work in Dundee has been and continues to be a collective effort driven by partnership. However, in order to become more than a sum of its parts, consistent coordination, communication and reporting systems and an ecosystem approach is needed to support long-term sustainable development. Valuable learning is being drawn from across and beyond the city and shared with others, and the long-term strategy needs to expand beyond the city limits, with significant potential to engage with wider regional agenda.

“**Dundee has potential to innovate and become an exemplar by fostering the city's capacity for ideas generation and practices of care among its highly collaborative community and taking advantage of its goldilocks scale.**”

Challenges arise where political support for culture is not reflected in budgets and when existing issues around talent retention and development and access to space are not addressed in pursuit of the “next big thing”. It is imperative that action is taken to address the precarity of creative employment and that the contribution of creative and cultural workers and organisations are recognised, valued and resourced appropriately at local, regional and national levels. Overall, an ecological approach to the cultural policy making is needed – understanding and strengthening interrelationships and interdependencies between different actors and cultural resources and the opportunities they present – including developing strategic linkages between different policy areas and development agendas connected with the local plan. Strong leadership which considers this ecology and is attentive to the power dynamics within it is crucial to a sustainable recovery. Dundee has potential to innovate and become an exemplar by fostering the city's capacity for ideas generation and practices of care among its highly collaborative community and taking advantage of its goldilocks scale.

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## Key recommendations

The key recommendations for cultural organisations and policy makers in Dundee are to:

- **Adopt an ecological response to recovery** including all parts of the Dundee creative ecosystem (policy, organisations, workers, communities/audiences) and considering connections beyond sector and city boundaries, including with wider local plan priorities.
- **Support creative workers as crucial members of the cultural economy and its supply chain** by addressing existing issues around precarious work and talent retention and development in the city, including addressing gaps in career development pathways (work placements, internships and apprenticeships) and providing more equitable access to financial support for freelancers.
- **Capitalise on the city's potential to innovate through collective action** and implement care-orientated practices and policies to support the cultural economy and its workforce.
- **Establish consistent coordination and reporting systems** for the Cultural Development Group to sustain capacity for collective action.
- **Secure communication channels** between Cultural Development Group members and policy makers to ensure the voice of the sector is heard.

# Introduction

**Covid-19 has had severe implications for economies, infrastructure and workers across the globe (McKibbin and Fernando, 2020). The Creative and Cultural Industries (CCIs) have been among the worst-hit sectors of the economy internationally, damaging their upward growth trajectory (Oxford Economics, 2020). The pandemic has also radically influenced interaction within and with urban spaces (Nathan and Overman, 2020) and transformed creative production and cultural engagement (Gross et al., 2021), with stark differences emerging in industries, organisations and individuals' abilities to sustain work and generate income during the pandemic (Siepel et al., 2021). Crucially, the pandemic has exacerbated social inequalities and intensified the already precarious nature of CCIs employment (Comunian & England, 2020; Comunian et al., 2022) which seems to become particularly visible in moments of crisis and disruption (Comunian & Conor, 2017).**


This report presents key findings from the 'Dundee Cultural Recovery Project' (2021). The project aimed to generate insights into the impact of the pandemic on the organisations and individual cultural workers (specifically freelancers) who make up Dundee's cultural economy and the role of policy in supporting Dundee's cultural recovery. The project was a collaboration between the Duncan of Jordanstone College of Art & Design at the University of Dundee, Leisure & Culture Dundee and Dundee City Council Events Team. The research builds on the work of the Cultural Development group of the Dundee Partnership and findings will directly feed into the Covid Recovery Plan being developed by the Cultural Development Group.

## 6 Key areas:

- Workforce
- Finance
- Engagement
- Covid impacts
- Spotlight on Freelancers
- Spotlight on Strategy
- Recommendations

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Following a description of the methodology used for this research, the report presents findings and discussion under the key areas of Workforce, Finance, Engagement and Covid impacts. 'Spotlight' discussions on Freelancers and Strategy are then presented, highlighting the specific experiences of creative freelancers during the pandemic and sharing core messages on cultural strategy development. The report concludes with a reflection on the impact of the pandemic on Dundee as a cultural ecosystem and presents recommendations for supporting sustainable and inclusive recovery practices and policies in connection with the city's cultural strategy and the recovery plan.

 **Recognising the interdependent (ecological) nature of cultural opportunities and their development (for social, cultural and economic benefit) has significant implications for future policy and practice, particularly in the wake of the Covid-19 pandemic.**

The pandemic has highlighted the importance of going beyond the 'hype' of culture and the creative city (Brokalaki & Comunian, 2021) and the value of adopting ecological approaches to understanding creative economies and cultural policy (Gross and Wilson, 2018) and the recovery process (Walmsley et al., 2021). Here understanding the cultural ecology or ecosystem refers to understanding the interrelationships and interdependencies between different actors and cultural resources within an environment (Holden 2015; Markusen et al. 2011). Central to this idea is that 'cultural opportunity needs to be understood not as located within single organizations or spaces, but through the interconnections and interdependencies between cultural resources of many kinds' (Gross and Wilson, 2018, p.333). Cultural resources could include, for example, a youth organisation, a school or university, a shopping centre, a Regularly Funded Organisation, a local authority, freelancers, a network of community members and more. Recognising the interdependent (ecological) nature of cultural opportunities and their development (for social, cultural and economic benefit) has significant implications for future policy and practice (ibid), particularly in the wake of the Covid-19 pandemic. It is also crucial that the power dynamics of cultural ecosystems be attended to in order to ensure that policy and practice can address rather than exacerbate inequalities.

As Gross (2021) posits, the Covid-19 crisis – while undeniably a time of great pain, loss, scarcity and heightened inequality – creates new possibilities and holds open space for hope. It is with this frame of mind that this report and the findings from the research are presented.



# Methodology

**The Dundee Cultural Recovery project followed a two-stage methodology including a survey and focus groups and additional interviews to collect both quantitative and qualitative data.**

In the initial stage of the research a city-wide survey of cultural organisations was run in April 2021. The main purpose of the survey was to understand the impact of Covid-19 on cultural employment, funding, activity and audiences through the collection of data on activity in the 2020/21 and in 2019/20 financial years to establish a pre-Covid baseline. This survey also identified gaps for growth, support and development opportunities. Headline impact data is presented in this report to support policy advocacy in connection with Dundee's Covid Recovery Plan.

The survey covered five key topics: Organisational status, Workforce, Funding, Engagement and Covid impact.

The survey was designed to align with other sector data reporting frameworks (i.e. Creative Scotland funding reporting) and respondents were asked to provide annual data for the financial year 2019/20 and 2020/21. Both numeric and free-text responses were collected in the survey.

The survey was distributed via Dundee City Council, the Dundee Cultural Partnership Development Group, the Cultural Agencies Network and the Festival and Events Coordinating Group. The emphasis of the survey was to capture organisational-level data.

The survey received responses from 19 cultural organisations in the city. All survey responses were anonymised and individual organisational data is not presented in this report. Descriptive statistical analysis is presented here to identify changes between the 2019/20 and 2020/21 financial years.

.....

## 19

**cultural organisations  
participated in  
the survey**

.....

## 26

**cultural stakeholders  
took part in  
discussions**

.....

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Following the survey, three online focus groups took place at the end of June 2021. Each focussed on a different stakeholder group – representatives of creative organisations, cultural strategy development group members and creative workers (freelancers). Focus groups lasted 2 hours and all activities took place online using MS Teams. Two additional online interviews were held with key stakeholders who were not able to attend the focus groups. All activities were audio recorded and transcribed verbatim for research purposes. Data was anonymised during the transcription process.

The focus groups supported knowledge sharing around issues of Covid-19 impact and recovery under the theme of 'Inclusive and Sustainable Cultural Recovery'. Through focused discussions themes from the survey data were explored further, including understanding the economic, social and psychological impacts of the pandemic on different cultural stakeholders. Discussion topics included but were not limited to: Organisational and individual impacts and responses to the pandemic; How cultural recovery plans can address pre and post Covid inequalities and support greater accessibility and inclusivity in cultural work and participation; Positive measures the city and region can take to support recovery and make things better for cultural organisations and workers.

# Sample

## ➤ Survey

The survey received responses from 19 cultural organisations in the city. Findings presented in this report therefore do not provide a full picture of Dundee's creative and cultural economy. The survey did however capture a range of sectors and key cultural organisations in the city, including the cultural organisations represented by the members of the Cultural Development Group.

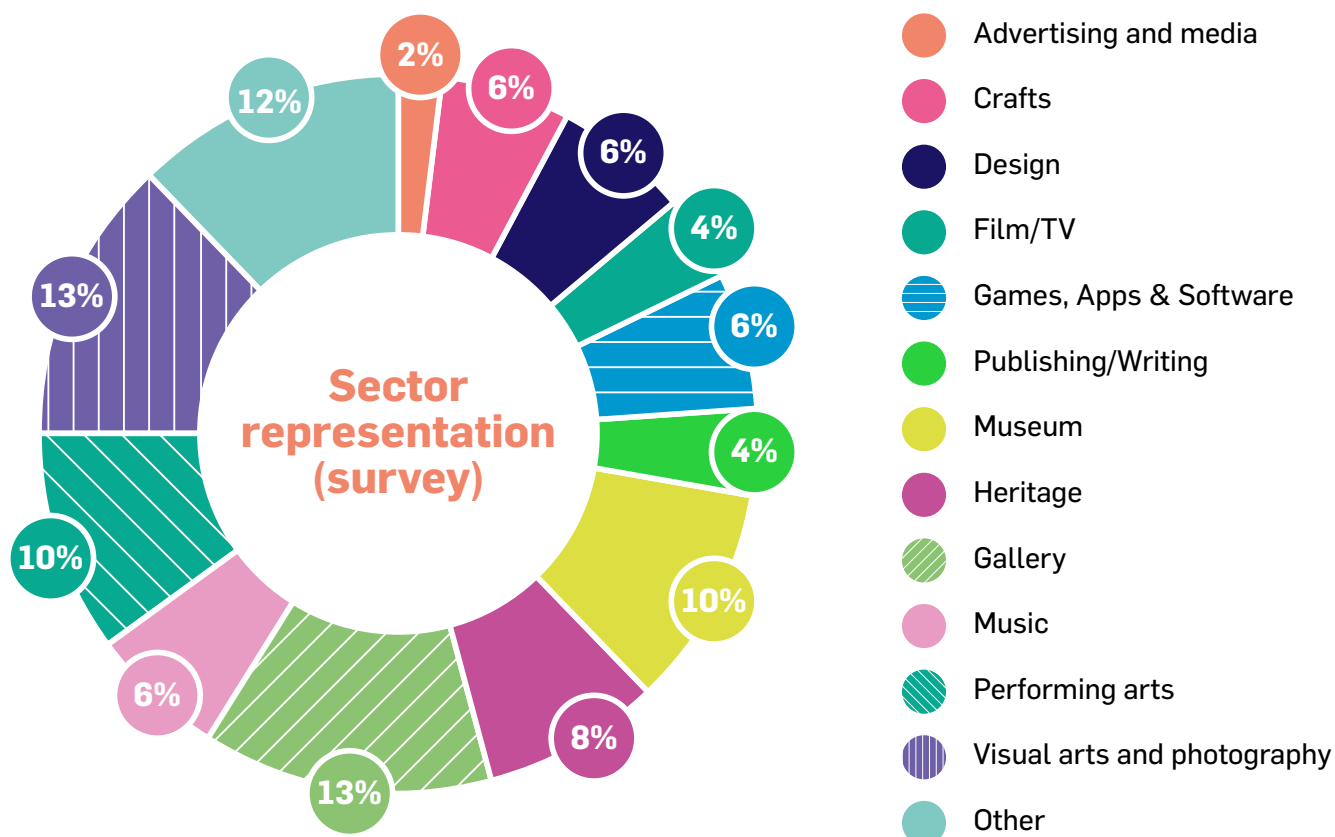
Organisations were asked to select all cultural and creative industries sectors that they worked in (see figure 1). 47% (n=9) respondents selected more than one sector category. The highest representation was in the categories of Gallery (13%) and visual arts and photography (13%). "Other" sector categorisation (12%) included cultural engagement departments for two higher education providers, two events venues, a science centre and a production facility (print). No responses were recorded for the categories of Architecture, Radio or Libraries. 79% (n=15) of organisational respondents were registered charities.

.....

**79%**  
of organisational  
respondents were  
registered charities

.....

Figure 1 response to question 'Which of the following creative sectors do you work in?'



.....

**26**

**cultural stakeholders  
took part in  
discussions**

.....

## ➤ Focus Groups

Following the survey, focus groups and interviews were conducted in order to gain a deeper understanding of stakeholder perceptions and experiences of Dundee's creative and cultural economy both prior to and during the pandemic, and their support requirements. Focus groups (3) and additional interviews (2) were held in June 2021 with members of a strategic lead group for culture in Dundee (n=7), representatives of creative and cultural organisations (n=12) and the city's two universities (n=2) and creative freelancers (n=6). A total of 26 individuals took part in this stage of the research.

Focus groups and interviews were all conducted online using MS Teams. Focus groups lasted two hours, and interviews one hour. Data was transcribed verbatim and anonymised. Quotes used in this report are therefore labelled according to the status of the participant (i.e. freelancer, organisational representative) and the sector they work in (i.e. theatre, design, museum/gallery).

# Key Findings

## Dundee's Cultural Workforce

This section both identifies key features of the Dundee cultural workforce prior to the pandemic (financial year 2019/20) and highlights the impacts observed during the pandemic (financial year 2020/21). This section primarily draws on quantitative survey data, but also provides expanded discussion based on additional qualitative information provided by organisations when responding to the survey and discussions during the subsequent focus groups and interviews.

Nearly  
**700**  
jobs in 2019/20

**-21%**  
jobs in 2020/21

**-34%**  
fall in freelancer  
employment  
in 2020/21

**35,650+**  
volunteering hours  
recorded in 2019/20

**-48%**  
volunteering hours recorded  
in 2020/21

## » Employees and freelancers

In the 2019/20 financial year, 19 organisational respondents reported a total of nearly 700 jobs. This included 293 employees (including full time and part time staff and artists/creatives). A higher overall number of freelance/contractual staff was reported: 402 (including full time and part time freelancers and artists/creatives). The majority of freelancers were classified as 'part-time artists/creatives) and this included freelancers/contractors on regular and temporary project or event-based employment.

In the 2020/21 financial year, the total jobs reported fell by 21% to nearly 550 (see Table 1). This included 281 employees and 266 freelancers were reported (including full time and part time staff and freelancer/contractors and artists/creatives).

The reduction in employment includes only a small reduction (-4%) of employees (part time and full time) between 2019/20 and 2020/21, including a previously planned restructuring of one organisation. This reflects the use of job retention schemes during the pandemic and further data will be required to assess any changes in levels of employment once such schemes end. However, during the second stage of the research it was also noted that the use of the furlough scheme was only possible for some jobs; for example, security and cleaning staff could not be furloughed and continued to incur costs during closure periods. In periods of reopening, additional staff were also sometimes required to ensure compliance with Covid-safety measures, generating additional costs during period of significantly reduced capacity and income generation.

Freelance/contract staff reduced at a higher rate than employees (-34%), most notably in the categories of "part-time staff" (-34%) and "Part-time artists/creative practitioners" (-35%). In contrast the number of full-time contractor/freelancer staff increased by 133%. During the focus group, organisations discussed turning to volunteers or contractors to deliver core activities in place of permanent staff members.

A loss of technical staff (for installations, events and digital work) was discussed during the focus group with organisational representatives. It was noted that freelancers were changing career paths, or considering leaving the sector out of necessity due to the loss of employment, with some taking further education/training courses and reskilling. Organisational representatives also commented on a loss of freelancer employment alongside wider staff reduction/working with a "skeleton staff" (primarily due to staff being on furlough). In the freelancer focus group, participants described their experience of the abrupt cancellation of work and associated loss of income. Further discussion on the impact of this is presented in the 'Covid impacts' and 'Spotlight on freelancers' sections.

.....

**402**

**full time and part  
time freelancers  
and contractors  
recorded in 2019/20**

.....

**Table 1 Dundee's cultural workforce 2019/20 and 2020/21**

Contract/type	2019/2020	2020/2021	% change
<b>Permanent paid members of staff</b>			
Full-time staff	188	186	-1%
Part-time staff	86	76	-12%
Full-time artists/creative practitioners	13	12	-8%
Part-time artists/ creative practitioners	6	7	+17%
<b>Total</b>	<b>293</b>	<b>281</b>	<b>-4%</b>
<b>Contractual or freelance staff</b>			
Full-time staff	3	7	+133%
Part-time staff	50	33	-34%
Full-time artists/creative practitioners	1	1	0%
Part-time artists/ creative practitioners	348	225	-35%
<b>Total</b>	<b>402</b>	<b>266</b>	<b>-34%</b>

It is also important to note that the impact on organisations of staff losses is relative depending on their size. For smaller organisations, any staff reduction can have a damaging impact on their ability to deliver core activity. Larger organisations' capacity can also be heavily impacted by a reduction in team size when typically operating with larger teams.

## » Volunteering and Training

447 volunteers and 35,653 hours of volunteering were recorded in 2019/20.

Volunteering was heavily reduced in 2020/21, although 197 volunteers and 18,457 hours were recorded in 2020/21. This represents a -56% reduction in volunteers and -48% reduction in recorded volunteer hours. While this fall is understandable (particularly associated with venue closures and activity cancellation, see 'Engagement' section) it nevertheless has implications for organisations who are largely volunteer-run and for training opportunities.

The survey indicated limited provision (pre-Covid) of training opportunities across the organisational respondents in the city. Findings show particularly low numbers of paid placements, internships and apprenticeships (9 in total in 2019/20 and 10 in 2020/21).

A higher number of unpaid placements, internships and apprenticeships was reported (26 in 2019/20 and 4 in 2020/21), but this was largely from one organisation. There was a -100% reduction of unpaid work placements in 2020/21, but again, almost all were from one organisation; one organisation took on two additional unpaid interns in 2020/21.

Although the presence of two higher education institutions in the city supports a local talent pipeline for the creative economy (Comunian and Gilmore, 2015), the survey suggests that there is a gap in professional training opportunities within the city which could support greater diversity and inclusion in access to creative careers.



## Finance

.....

**£14.1m**  
income in 2019/20

.....

**£7.3+**  
earned income  
in 2019/20

.....

Earned income fell to  
**900k**  
in 2020/21

.....

This section identifies key features of the financial circumstances of cultural organisations in Dundee prior to the pandemic (financial year 2019/20) and highlights the impacts observed during the pandemic (financial year 2020/21). Again, this section primarily draws on quantitative survey data, but also provides expanded discussion based on additional qualitative information provided by organisations when responding to the survey and discussions during the subsequent focus groups and interviews.

15 organisations provided financial income data for 2019/20 and the total was over £14.1m. About half of this was 'earned income' (over £7.3m) and public funding accounted for around £6.4m in total. Table 2 provides a breakdown in the type of funding and amount received in the 2019/20 financial year.

**Table 2 Income and Funding 2019/20**

Source of funding	Amount reported 2019/20
<b>Public funding</b>	
Local authority	£1,532,607
Other public funding	£1,831,558
Creative Scotland regular funding	£2,851,907
Creative Scotland other funding	£197,656
<b>Other funding</b>	
Earned Income	£7,320,096
Private: Donations, gifts and legacies	£905,118
Trusts and Foundations	£1,478,151
Other funding	£1,701,437

11 organisations provided financial income data for 2020/21, with a total of over £12.76m<sup>2</sup>. A significant fall in earned income was reported with a total of around 900k<sup>3</sup>. This shortfall partly covered by an increase in public funding which accounted for around £9.8m. Table 3 provides a breakdown in the type of public funding and amount received in the 2020/21 financial year.

<sup>2</sup> Some organisations were unable to provide full financial year data at the time of the survey

<sup>3</sup> Data provided by 10 organisations



**“We rely on the ability to trade and earn an income through sales of [event] merchandise and traders on the day. We also rely on sponsorship from local businesses. We haven’t been able to do any of those things placing the organisation at risk.”**  
- Cultural Event Organiser

It is important to note that there is significant variation in levels of public funding or income generation across the city’s cultural organisations; in 2019/20 total income reported ranged from around £44k to over £6m and over £12.7m of total income was attributed to four organisations; in 2020/21 total income reported ranged from £0 to over £7m and £11.8m of total income in 2020/21 was attributed to three organisations.

**Table 3 Income and Funding 2020/21**

Source of public funding	Amount reported 2020/21
<b>Public funding</b>	
Local authority	£1,434,460
Other public funding	£4,963,989 <sup>4</sup>
Creative Scotland regular funding	£2,857,338
Creative Scotland other funding	£571,197
<b>Other funding</b>	
Earned Income	£896,656
Private: Donations, gifts and legacies	£167,951
Trusts and Foundations	£1,352,745
Other funding	£2,804,568

Differential experiences of the economic impact of the pandemic was also reflected in organisations’ estimates of the change in income experienced due to Covid-19 in the 2020/21 financial year. Here one organisation estimated an increase in income, three estimated it had remained stable and 12 estimated a decrease in income (see table 4). During the second stage of the research, organisational representatives reflected on the relativity of their circumstances depending on their organisational status and sector. It was voiced that regularly funded organisations (Creative Scotland and Local Council) were seen to have greater funding security and capacity to leverage additional funding during the pandemic, but also that higher education institutions in general were more robust than cultural organisations as they were able to capitalise on their institutional status (see ‘Covid impact’ section for further discussion).

<sup>4</sup> This increase in ‘other public funding’ likely reflects National Covid relief funding. NB. around £4.5m is attributed to one organisation.

**Table 4 Estimated income change due to Covid-19**

<b>For the financial year 2020/2021, what change in income did you experience due to COVID-19</b>	<b>% of organisations (n=16)</b>
Increased	6%
Remained stable	19%
Decreased by up to 25%	19%
Decreased by 26-50%	31%
Decreased by 51-75%	12.5%
Decreased by more than 76%	12.5%

Data on expenditure was not captured in this survey, but it was highlighted that additional costs were incurred in connection with enhanced health and safety procedures and that income generated in 2020/21 (public funding and earned) did not necessarily cover operational costs. It was noted in the second stage of the research that the projections for the next financial year looked worse than those for 2020/21. It will therefore be important to continue to track the financial circumstances of cultural organisations over the next few years to understand the full impact of the pandemic on income generation capacity and funding levels.

*"Massive reduction in capacity levels, we only achieved 433 in visitors throughout the entire year with restrictions forcing numbers being capped at 96 per day. On average this brought in £480 and we required 10 staff to facilitate the restrictions and cleaning requirements. Not only have we lost revenue income but opening has not covered costs." – Culture/Education Organisation*

*"We estimate that we will see a reduction in revenue through visitor ticket sales due to periods of closure and ongoing travel restrictions (both domestic and international). We also estimate to see a reduction in event revenue over the next 12-24 months, due to the difficulty of holding events in our traditional format at the venue." – Museum/Heritage Organisation*

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The majority of organisational respondents (n=13) reported receiving some form of Covid-relief funding, with some organisations accessing more than one source of funding. 5 organisations indicated they had not received any specific relief funding<sup>5</sup>. A range of funding was accessed, including general business and enterprise support, sector-wide funding and specific subsector funding (i.e. performing arts). Funds identified by survey respondents included:

- Non-Domestic Rates Relief
- Business Support Fund Grants
- Pivotal Enterprise Resilience Fund Furlough /Job Retention
- Scheme Bounce Back Loan
- Strategic Framework Funding
- Third Sector Resilience Fund
- Rank Resilience Fund
- Communities Recovery Fund
- Scottish Government Emergency Cultural Funding
- Cultural organisations and venues recovery fund
- Visit Scotland Venue Support
- Performing Arts Venues Relief Fund
- Museums Galleries Scotland Covid-19 Museum Development Fund
- Museums and Galleries Scotland Urgent Response Covid-19 Fund
- Museums and Galleries Scotland Recovery and Resilience Fund
- Museums and Galleries Scotland Digital Resilience Fund
- Independent Cinemas Recovery and Resilience Fund
- Event Scotland - Event recovery fund
- Art Fund
- BFI funding
- Digital Projects funding (including National Lottery)
- Other trusts and foundations

<sup>5</sup> one organisation did not respond to the question

## Engagement

This section identifies engagement activity (visits, activities and participation) both prior (2019/20) and during the pandemic (2020/21). This section draws on quantitative survey data and additional qualitative information provided by organisations when responding to the survey and the discussions that took place during the focus groups and interviews to provide more in-depth insights into the impact of Covid-19 on cultural activity in the city.

**1.7m+**

visits in 2019/20



**-91%**

venue visits in 2020/21

nearly  
**4,800**

public events in 2019/20



**-81%**

public events in 2020/21

**1,900+**

professional development  
sessions in 2019/20



**-96%**

professional development  
sessions in 2020/21

**3,084**

outreach & education  
sessions in 2019/20



**-83%**

outreach & education  
sessions in 2020/21

## » Visits, activities and participation

68% (n=13) of organisational respondents indicated that their organisation was based in a venue open to the public and in 2019/20, they reported over 1.7million visits to their venues. Across all organisations that delivered public events (performances, exhibitions, screenings and other) in 2019/20 and provided events and attendance data (n=18), nearly 4,800 public events with close to 680,000 attendances were reported, highlighting the extent of activity and engagement prior to the pandemic.

Between 2019/20 and 2020/21, reported visits to venues reduced by 91% and the number of public events held reduced by 81%. One organisation reported a 100% reduction to visitors and several organisations reported a 100% reduction to public event delivery. Table 5 provides a breakdown of public event delivery in 2019/20 and 2020/21 across the organisations.

**Table 5 Visits and public events in 2019/20 and 2020/21**

Performances			
	Events	Participants <sup>6</sup>	Attendances <sup>7</sup>
2019/20	552	341	118,079
2020/21	126	53	5,705
% change	-77%	-84%	-95%
Exhibitions			
	Events	Participants	Attendances
2019/20	41	341	252,045
2020/21	15	92	45,136
% change	-63%	-73%	-82%
Screenings			
	Events	Participants	Attendances
2019/20	3,043	27	108,438
2020/21	411	0	5,301
% change	-86%	-100%	-95%
Other			
	Events	Participants	Attendances
2019/20	1,160	90,275	127,838
2020/21	366	855	55,465
% change	-68%	-99%	-57%

<sup>6</sup> Participants are those actively learning, being trained or taking part in the activity

<sup>7</sup> Attendees are those who attend an exhibition, screening or performance as an audience member.

While some organisations moved events online, the survey and focus groups indicated that this was not possible for all organisations due to the nature of the event/the work or the capacity of staff. This was particularly challenging for those with a skeleton staff running the organisation while others were on furlough (see 'Covid impact' section for further discussion).

Organisations were asked to give an estimate of where previously reported events had taken place. In 2019/20, 18 organisations estimated that 94.5% of public activities (performances, exhibitions, screenings and other) took place in Dundee, with just over 50% being held at the organisation's own venue. Only one organisation reported delivering any activities online in this year. In 2020/21, 17 organisations estimated that just over 34% of activities took place in Dundee, including 22% at their own venues, and online delivery increased to nearly 66%. Table 6 provides a breakdown of the estimated % of delivery of activity by location.

**Table 6 Location of delivery of public activity in 2019/20 and 2020/21 (estimated %)**

Location	At own venue(s) in Dundee	Dundee (outside of own venue)	Other Scottish local authority areas	Wider UK	International	Online
2019/20 (n=18)	50.7%	43.8%	4.7%	0.2%	0.5%	0.1%
2020/21 (n=17)	22.1%	12.3%	0.0%	0.0%	0.0%	65.7%

## Digital engagement

Across the creative and cultural sector and beyond, there was an emphasis on 'moving online'. 89% (n=17/19) organisations that responded to the survey stated they had their own website or social media. 12 organisations provided data on forms and levels of digital engagement (see Table 7 below), with figures indicating that social media and viewing of content (video and audio) increased but that general engagement with websites for information decreased.

**Table 7 Digital engagement 2019/20 and 2020/21**

Digital engagement type	2019/2020	2020/2021
Number of Website Users	3,304,586	562,809
Website Pageviews	8,975,855	3,402,842
Website Sessions	1,813,931	828,157
Combined followers (social media)	254,931	330,704
Total video plays (e.g. YouTube, Vimeo etc)	116,085	364,207
Total audio plays (e.g. SoundCloud, MixCloud etc)	5	177



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## ➤ Creative development

Prior to the pandemic, cultural organisations delivered a considerable number of support/professional development sessions (over 1,900 in 2019/20). During the pandemic the provision of artist and creative engagement varied, with some activities remaining fairly constant/only slightly reduced (commissions, support in kind) while others reduced more significantly (residencies).

Overall, the number of support/professional development sessions reduced by 96% between 2019/20 and 2020/21. However, overall participation was reported as increasing by 21% as some organisations moved activities online and were therefore able to engage with a larger number of participants. However, most organisations reported a reduction in participants. Only one organisation had been delivering such activities online in 2019/20.

Freelancer focus group participants also highlighted the increased accessibility of professional development events and improved network engagement where events had moved online. This was seen as a positive method for community building and maintenance during the pandemic which could be continued to support wider and more inclusive engagement with the creative community of Dundee.

*"the kind of digital stuff that Creative Dundee have been doing like the digital Amps breakfasts, I have got to know far more people, digitally, than I would have had if they had been purely physical events. And because of the consistency of those every week [...] for me, there was a stronger sense of creative community in Dundee." – Theatre Freelancer*

Higher education institutions are key actors in the creative economy (Comunian & Gimore, 2015). During an interview with HE representatives, it was noted that there is usually a "drop in" capacity of art schools but that due to Covid-19 restrictions there were significant capacity and space issues which meant that support and space available for externals (i.e. creative practitioners) was reduced in order to deliver on campus teaching (where possible) to students. It was also noted in the survey and discussed in the subsequent interview that the capacity of one HE cultural engagement team was significantly reduced during the pandemic (a withdrawal of central funding and staff absence) which had a devastating effect on their ability to contribute to the wider community.

## ➤ Outreach and education

Outreach and education activities were significant in Dundee prior to the pandemic but were heavily impacted.

In 2019/20, organisations reported delivering 3,084 outreach and education sessions, with over 147,000 participants (including children and adults). This included 1,210 sessions run through nursery, school, college or university groups and 1,874 other sessions.

In 2020/21, the provision of outreach and education activity reduced to 536 sessions (-83%), engaging with 6,680 participants (-95%). This included 99 sessions run through nursery, school, college or university groups and 473 other sessions.

Table 8 details the number of specified age group participation recorded in 2019/20 and 2020/21 and the percentage change between the years<sup>8</sup>.

**Table 8 Outreach and education participants recorded by age group in 2019/20 and 2020/21**

Group	2019/20 participants	2020/21 participants	% change
<b>Children</b>			
0-4 years	6,844	132	-98%
5 - 12 years	19,632	350	-98%
13 - 17 years	13,240	262	-98%
Other	44,000	243	-99%
<b>Adults</b>			
18 - 25 years	5,950	498	-92%
Adult learners (26+)	8,504	4,017	-53%
Other	49,104	1,178	-98%
<b>Total</b>	<b>147,274</b>	<b>6,680</b>	<b>-95%</b>

<sup>8</sup> Additional participations are included in the total participation figure to account for additional information on cross group participation provided by organisations (i.e. where 'adults' were recorded as 16 years plus and children as 0-15 years).

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Prior to the pandemic, outreach and education work had been almost entirely physical and predominantly venue based. Although some activity transitioned online (primarily adult learner sessions) there was reduced uptake of online sessions. While one (large) organisation reported delivering additional outreach and engagement activities during the pandemic, such as providing art supplies, video content and developing art trails, others highlighted the challenges of moving online and continuing to deliver activities on reduced staff numbers due to furlough and the cancellation of freelance contracts.

*"Our whole Learning and Outreach programme moved to be delivered online throughout 2020/2021, with government guidelines not allowing in-person sessions to take place at any point throughout the year. Our online programme of classes have run with limited capacity, but there has also been a far lesser uptake in places." – Performing Arts Organisation (1)*

The cancellation of learning and outreach activity was also identified as having a significant impact on the income of creative freelancers (see 'spotlight on freelancers' for further discussion).

**“We were unable to host any in-person activities, [...] Although we looked to move as much as we could online for 2020/2021, this was made challenging by the need to furlough staff for long periods. [...] It also meant there were challenges around new technology and online hosting which we were initially unprepared for.”**  
– Museum/Heritage Organisation

*"I work with the creative learning team at a local museum and usually deliver a few outreach sessions per week but these were all cancelled and some, for most of last year never schedule[d], so although 4 were booked and cancelled I will have actually lost a lot more work than that."*  
– Craft/Design Freelancer (1)

**“I lost all of my income from freelance learning and outreach work in 2020/21, both those that I organise alone and that I do for other organisations. And the nature of my work meant I wasn't able to take them online.”** – Craft/Design Freelancer (2)

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## Covid impacts

This section of the report focuses on themes emerging from the qualitative responses to the survey and the focus group discussions in relation to the impact of the pandemic. These findings are discussed in relation to two key themes: Changing models; and Precarious future.

“The pandemic has had a profoundly significant impact on the lives of our core staff, who have faced redundancy or significant changes to their role, and also to the wide community of creative practitioners that we would normally be working with through paid contractual freelance employment. The impact is not temporary - it will reach way beyond lockdown. There has been a tangible shift and reassessment of what is considered 'core business' and anything outwith this has been reduced/ removed, in a bid to preserve what is considered essential elements of delivery. We will try to find new ways to nourish the cultural health, community connection and creative innovation of our organisation but can foresee this being a significant challenge in the unfolding economic climate.”  
– Cultural Engagement Team (2)

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### ➤ Changing models

The survey responses and subsequent focus group/interview discussions highlighted how organisations had adapted their business models, funding streams and operating structures in response to the pandemic. Experiences were diverse across the sector. For some (organisations and freelancers), the pandemic and associated circumstances prompted a diversification (of business model, funding streams and activity). This included night-time events venues switching to provide day-time food and drink services, creating new programmes in response to new needs emerging during the pandemic (for communities and creatives) and developing a blended approach to delivery (virtual and physical). Organisations reflected that this represented both a short and longer-term diversification strategy in response to changing markets, particularly for those which had previously relied on events-based income, overseas business and international tourism.

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*"We created 5 new 'activations' throughout the City Centre, which would not have taken place otherwise. We opened up a 2 new funding streams to deliver artist led activities, which is not in our usual programme of events. We created a new event [...] which put a spotlight on the kind acts of people and organisations throughout COVID." – Events Team*

*"all of our delivery has moved to a blended approach and we adapted depending on audience need. So for instance, [an event] was delivered digitally [...] and in communities with [...] some kit boxes going directly to children in their own homes. We also developed an outdoor [activity] trail to encourage good health and mental wellbeing." – Culture/Education organisation*

For some organisations who had previously operated wholly or largely without public funding, furlough payments, public funding (local and national) or fundraising income became their main revenue source, in place of earned income. It was however noted that a reliance on public (including relief and furlough payments) and charitable funds, while currently sustaining organisations, was not sustainable long-term.

Diversification was seen by some as providing positive lessons and adaptations for the future. However, it also came with challenges, particularly when operating with reduced staff numbers and finances.

For example, an organisation that became reliant on public and charitable funding following a dramatic fall in earned income identified that this had created additional pressure on a reduced staff to respond to multiple requirements for reporting on funding received.

**“The impact of the pandemic has been seismic, as it has forced the charity to find new ways of operating the organisation. However, there have been positive lessons from the pandemic and ideas we can build on into the future.” – Museum/Heritage Organisation**

*"It has forced us to become more strategic with where we aim to get our financial income for in the future as we can no longer rely on the visitor attraction revenues with reduced capacity."*  
- Culture/Education organisation

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Meanwhile, other organisations identified that there had been a shift in the emphasis towards “core business” and recovery. It was noted that the emphasis on “core business” in some organisations was also associated with redundancies and cuts to budgets in order to protect and prioritise these areas, which was further associated with a move away from outreach activities (as was illustrated in the reduction of activities taking place, see ‘Engagement section’). One organisation discussed how they were moving into an austerity model in order to address the financial shortfall experienced during the pandemic and projected financial circumstances for the next financial year. It was also noted that it could be a challenge for organisations to retain their quality of offer and accreditation (i.e. as Visit Scotland rated destinations) in the process of reviewing their cost base for sustainability.

More positively, a focus on core business was seen as providing an opportunity to develop strategic direction for organisations, including expanding existing work to engage with a wider range of diverse audiences and addressing organisational inclusivity and sustainability.

*“We have moved away from our proposed business plan for this period and are instead working to a new 18 month Recovery and Resilience Plan, which focuses on delivering core activity, learning about the new and changed needs and attitudes of our staff, artists and audiences, creating new EDI and environmental sustainability plans, and continuing to advocate for the role and value of the cultural sector.” – Visual Arts Gallery*

*“Priorities have shifted away from outreach and cultural engagement, focusing mainly now on what is seen as ‘core business’. Redundancies mean less capacity to deliver activities and more emphasis is placed on securing external funding.” – Cultural Engagement Team (1)*

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## Digital innovation, agility and upskilling

The closure of venues and cancellation of physical events created an imperative to move online. Work to adapt content and delivery and business models therefore incorporated digital translation and new content creation for online platforms. Positively, some organisations articulated that this content would not have been produced without the imperative of the pandemic and that it enabled them to reach wider (global) audiences and is a practice they will look to continue in the future. Some groups had accessed specific funding (public and charitable) for digital projects to support this work, and one organisation reported winning awards for innovative digital outreach and education work. However, virtual production and online delivery was not possible for all organisations depending on the nature of their activity, or due to significant reduction in capacity (i.e. staff on furlough). Retention of digital audiences was also seen as a challenge.



**“The Covid-19 pandemic impacted our activities by forcing us to move everything online, assuming we were able to do so. One positive of this was that it made us think creatively and find new ways of creating and delivering activities that we will carry forward into the future.”- Museum/Heritage Organisation**

*“There has been a significant shift to producing online content. This includes both recordings of our online events, which can then be viewed around the world, and in addition new activity and content online to supplement or replace face-to-face activity.” – Cultural Engagement Team (2)*

The move to digital creation and online dissemination also created a greater demand for digital skills. While organisations engaged in upskilling of staff in digital and audio-visual skills to address this, others continued to rely on outsourcing specialist knowledge (freelancers). There were however capacity and financial constraints on organisations' ability to develop or expand online content, particularly where staff numbers were reduced (due to furlough, redundancies or cancellation of contracts) and budgets had been cut.

*“Our immediate digital response has had a positive impact on the outputs, as we have developed new ways to deliver our services digitally. Our team has been constantly learning digital and audio-visual skills and have had an exponential growth in this area.” – Performing Arts Organisation (2)*

*“Online engagement increase seen as positive, however the level/type of skill and capacity required has been underestimated [...] There has also been an expectation that online events require less funding to deliver than physical events. It has emerged, however, that the cost, skillset and capacity to deliver online/blended (online-physical) events is significant and requires considerable funding/re-training/external specialist support.” – Cultural Engagement Team (1)*



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## » Precarious future

With the exception of those whose business model already focused on the production and delivery of digital goods and services, concerns were raised across the creative and cultural sector about both the short and longer-term impact of the pandemic on staff (numbers and capacity), skills (level, specialisms, availability) and finances (budget cuts, additional costs, availability of future funding).

*"It's hard to overestimate the impact of Covid-19, with our organisation closed to the public for over a year [...] Our capacity to earn our income, which makes up around 50% of our turnover, stopped overnight. Reopening meant an extreme reduction in our capacity and reduced numbers in all areas of our building [...] This means that our ability to earn vital income has been hugely impacted making for an extremely precarious future." – Visual Arts Gallery*

*"Have yet to hear what is happening with our funding for the coming year. We received a cut to our income and were also advised to reduce spending this year in case we didn't get funding next year and leave a skeleton budget for next year." – Visual Arts Organisation*

This was exacerbated by high levels of ongoing uncertainty (financial and regarding restrictions, audience/consumer response and future trajectory of the pandemic). Both a lack of uptake (audience hesitancy) and excessive demand were of concern in this context (exceeding staff and financial capacity, particularly regarding a shortage of contractors/freelancers and time needed to deliver projects after reopening).

*"We expect to see an increase in demand for our services. That is challenging for us to manage with existing staff capacity." - Design Organisation*

## (Un)certainty and (in)stability

Such uncertainty, particularly regarding financial uncertainty (reflecting current or future employment precarity), fluctuations in restrictions and changes to organisational practices, was also articulated as putting additional pressure on staff. This was particularly complex for organisations with a diverse activity portfolio where different restrictions were applied to different parts of the business.

*"The stress on the team of having to reschedule planned activity many times over, as well as learn how to operate a complex building in a Covid-safe way, has been immense, and it shows no sign of slowing. The complexity of our building and the many strands to our programme mean that we have to comply with guidance and restrictions for cinemas, galleries, retail, production facilities, hospitality and office spaces." – Visual Arts Gallery*

*"The constant financial threat as an arts organisation with no core funding had a profound effect on our staff, especially on our junior team who then had to be managed digitally and needed constant reassurance, impacting the Executive Team's time on pursuing funds to stabilise the charity." – Performing Arts Organisation (2)*

The need for stability and clarity was prominent across the stakeholder group discussions and in responses to the survey. In the immediate term, organisations called for clarity and consistency in what was possible to deliver and how (including health and safety guidance). This included requests for clarity at local and national levels. It was noted that there was limited national strategy for certain areas of the creative and cultural industries, including their supply chains.

In preparing for the reopening of venues and activities resuming, it was also noted that additional time was required, to enable organisations to transition (back) to physical event delivery and source equipment and staff, particularly freelancers who were seen to be in shorter supply (see 'workforce' and 'spotlight on freelancers' sections). Other cultural organisations had concerns over their continued access to space, particularly in areas marked for (re)development in the city. Short notice of the end of tenancies were seen to be particularly challenging as organisations would not have time to make other arrangements. Although acknowledging the importance of safety and the health implications of the Covid-19 pandemic, a number of organisations reflected on their inability to operate (sustainably or at all) under existing restrictions (social distancing and capacity) and therefore called for an easing of restrictions. At the local level, there were also calls for greater support for outdoor projects and events, including investment in infrastructure and revisions in planning processes to facilitate such work.

*"Assurances that we will be allowed to continue renting our premises or will be rehoused to an appropriate/fit for purpose premises if we do get evicted - we have been informed that this may happen as the council intend to 'revamp' or develop the industrial estate we are housed in, and that we may not receive notice in time to make other arrangements. We have been here for 20 years and have made numerous tailorings and improvements to the unit, and right now with so much up in the air would be an especially bad time to find ourselves without a building." – Visual Arts Organisation*

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## Duty of care

Volunteer and community run organisations also experienced significant pressure to continue activity and support audiences/members, with additional pressure and a heightened sense of responsibility to care for elderly and vulnerable members of the community. It was also discussed how community groups/organisations had been among the first to close at the start of the pandemic because they were typically run by older/more vulnerable people or engaged with higher-risk groups.

*"We are all volunteers and give a lot of time to this organisation. COVID makes giving this time freely especially draining" – Visual Arts Organisation*

**“a lot of the community galleries are done by older generations. And they were the first to fall, and unfortunately, I see them being the last to come back. Because people just don't have that resource or energy. They're doing things as volunteers in their community for the community, but they don't have either the money or the people resource to do that. And likewise, those groups were a lot of them were shielding a lot them have other stuff going on.”**  
– Visual arts organisation representative

Organisations were also asked to reflect on whether they perceived the pandemic as having greater impacts on particular groups of staff. Responses highlighted the additional pressures and challenges faced by carers and vulnerable staff, but also organisations with junior teams made up of younger staff members. In one instance, professional counselling services were sought to support the mental health of staff. Other organisations highlighted the need for ongoing flexibility in working practices to support employee wellbeing.

*"Staff who have been shielding or living with people who are shielding have been particularly impacted and we have been careful not to ask anyone to come back to work in the building who has not felt able to. We are also aware of the large impact of caring for young children and home schooling has had on parents." – Visual Arts Gallery*

*"I think there's a very real impact on people who live on their own, or are single carers. Managing home working and caring demands is very challenging. The mental health impact on our workforce will be felt for a long time. The flexibility for working needs to be maintained, but organisations must find a way to do this which puts the needs of the employee first. Home situations (shared flats, using personal equipment, no spare room, no homeworking allowance, caring responsibilities etc) are complex and varied." – Design Organisation*

Overall, there was a strong sense of responsibility and duty of care expressed by organisational representatives, both for their staff/colleagues, the freelancers they worked with and the wider community. The need for self-care and consideration of personal health and wellbeing was also expressed by organisational representatives and freelancers.

# 5

## Spotlight on freelancers

During the freelancer focus group, much of the discussion focused on the cancellation or postponement of contracts and significant or complete reduction of income generated from creative employment. Freelancer participants in the focus group shared that they had or were currently considering leaving the sector and knew others who had already left. While this has severe consequences for individual freelancers, it also has a damaging effect on the wider sector and the workforce supply chain.

*"I'm freelancing on some pretty broad things since the pandemic, because everything that I was working on was cancelled" – Events Freelancer*

In both the survey and focus groups freelancers were identified as working in key supply chain areas (for organisations and cultural provision in the city) such as install and gallery technicians, events delivery, designers/artists, hospitality outreach and education activities – the aspects of cultural activity which were most significantly affected/ prone to cancellation and therefore loss of work (see 'Engagement' section). During the focus group, organisational representatives also discussed the impact of freelancers leaving the sector, re-training or taking on additional non-creative employment on their capacity to deliver activities both during the pandemic and upon reopening/restarting events.

*"We work with artists as freelancers to create shows for our exhibition spaces, to present work as part of our public programme and to deliver our learning and community activity. We also work with freelancers as designers for our comms materials, photographers at our events and to document our exhibitions, to host special events and to co-curate or programme tailored activity. We also work with freelancers as our gallery technicians, to install our signage and interpretation materials, and to create video content for our exhibitions." – Visual Arts Gallery*

*"there are customers all over the place that are scrambling now, for technicians, we can't get them because they've decided to do other things. And that's going to be a pressure going forward as things start to open up." – Events organisation representative*

Freelancers reported negative experiences and exploitative contractual relationships with larger cultural organisations during the pandemic. In some cases, this had resulted in experienced creatives deciding to give up freelance careers because of the emotional and financial strain this caused.

Issues were also raised regarding organisations (prior to the pandemic) recruiting from Edinburgh and Glasgow with limited opportunities for local creatives and exacerbating graduate retention issues in the city. Recent changes in organisational leadership were however perceived as improving engagement with local creatives. During the pandemic, restrictions on travel were also seen to benefit local freelancers.

**“ Freelancers reported negative experiences and exploitative contractual relationships with larger cultural organisations during the pandemic. In some cases, this had resulted in experienced creatives deciding to give up freelance careers because of the emotional and financial strain this caused.**

While a small number of organisations were able to honour freelance contracts when events or activities were cancelled, this was not practiced or viable (due to financial constraints) across all organisations. In addition to contract cancellations, freelancers in the focus group highlighted that projects were dragging out and that with repeat cancellations/delays they were often working additional hours unpaid. There was also a knock-on effect of freelancers feeling pressure to hold time open for potential projects/jobs that may not come to fruition or be cancelled.

*“our tour cancellation [...] also impacted our engagement with freelancers, dancers and technical teams, as venues did not pay us the fees and we could not honour the freelancers' agreements, negatively impacting the professional relationships.” – Performing Arts Organisation (2)*

*“I found the larger organisations to be abysmal. They dropped us like hot potatoes, and then didn't answer emails. And that's partly because their staff weren't given any, you know, they didn't know what was going on, so they couldn't tell us what was going on. But for freelancers, who are you know, weren't on furlough didn't have you know, anything to turn to.” – Visual Arts Freelancer*

Furthermore, freelancers discussed how informal negotiations were taking place with organisations with requests to reduce payments or add work to existing projects without additional compensation. This has potential to exploit the already precarious circumstances of creative freelancers, damage professional relationships and could ultimately result in freelancers leaving the sector with detrimental effects on the workforce supply chain for the creative economy.

*“I've spent the last year dealing with some of the most horrendous contractual difficulties that our members have faced. And some of which had to end up taking legal action to recoup money that they were owed” – Theatre Freelancer*

## **the pandemic exacerbated the already precarious nature of freelance creative employment, requiring an even further diversification of activity.**

Falling through the gaps in (national) financial support schemes and the impact on the livelihoods of creative freelancers was another key feature of the discussion. Ineligibility or insufficient finance were prominent issues raised; for some, applications had been rejected based on technicalities and misunderstanding of how creative businesses might be set up, while others with an interdisciplinary practice struggled accessing sector-specific funding (for visual or performing artists). More positive experiences were reported where application and eligibility requirements were simplified and where decision-making panels were made up of individuals with an understanding of the sector. There were also reflections on the generosity of mutual aid networks within the sector and valuable coordinating support by sector representative bodies. Nevertheless, discipline specific funds – including those even those administered by those with sector knowledge – could be restrictive to those with an interdisciplinary practice. This was seen to be particularly challenging for Dundee-based freelancers who expressed the city's creative and cultural sector required a diverse practice in order to be able to respond to the opportunities available.

*"I totally appreciate that Visual Arts Scotland did an incredible job. And it must have been so hard to see all these applications and kind of be in the situation yourself as well. So total empathy for all of that. But it was, I think, a really interesting model, and to have people that had insights into the sector and personalities and the jobs to be in that position." – Events Freelancer*

It was noted that levels of funding available were also noted as not being comparable to furlough support for employees, thereby creating and widening divides between PAYE employees and freelancer creative workers. Overall, freelancer participants highlighted that the pandemic had exacerbated the already precarious nature of freelance creative employment, requiring an even further diversification of activity (including employment within and outside of the sector). Furthermore, the loss of employment and limited access to income support impacted housing security, particularly for those with limited or no savings. This included immediate challenges paying rent and mortgages, and longer-term concerns about additional expenses incurred through taking out loans and mortgage deferral.

Beyond financial and structural differences in experiences, the pandemic also highlighted discursive differences in how freelancers and employees (again within and outside of the sector) were perceived and treated by organisations, the public, press and governments during the pandemic response. In particular, the labelling of financial support for creatives as "hardship" funding, and intensive, highly personal application processes were seen to be particularly damaging. There were also class-based dynamics articulated in who felt "worthy" to apply for hardship funding and wider financial aid.

While such precarity is also found beyond the creative and cultural sector, it nevertheless highlights how creative workers and the sector can serve as weathervanes of current changes (Comunian and Brook, 2019) and emergent trends in the general labour market (Brook, 2016).

# 6

## Spotlight on Cultural Strategy

**The core message from the discussion with representatives of cultural organisations involved in developing the city's cultural strategy was that work to date has been a collective effort driven by partnership. In developing and implementing a recovery strategy it is imperative to continue to work collectively, in a coordinated manner. Strategic coordination is needed to bring together the passion, experience and knowledge found across the city (and beyond) and support an ecosystem approach to both the recovery process and long-term sustainability of the cultural sector in Dundee.**

In revising the cultural strategy in light of the pandemic, it was emphasised that the fundamental principles of social justice and partnership remained central. Nevertheless, Covid, as a moment of interruption and disruption, also presented opportunity for renewed challenge and change, creating opportunities to reconsider priorities for the sector, update the strategy and set new collective challenges.

In the development of the strategy itself, there was a desire to avoid creating a top-down approach to strategy development and implementation by drawing on the valuable networks already embedded in Dundee's cultural sector and including voices from across the ecosystem. This included engaging with local communities and artist networks, alongside higher education institutions who were seen to be an integral part of ecosystem, particularly for their capacity to support the wider sector through institutional partnership, research, education/training and championing excellence across the city. However, there remain concerns around how inclusive and collective future strategy development will be, particularly regarding engagement with freelancers and smaller or more informal community groups as institutional attention focuses on "core business" and recovery.



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**“ Strategic coordination is needed to bring together the passion, experience and knowledge found across the city (and beyond) and support an ecosystem approach to both the recovery process and long-term sustainability of the cultural sector in Dundee.**

There was a clear drive to respond to the pandemic and take action to support the sector and the ecosystem. In order to galvanise energy and effort and become more than a sum of its parts consistent coordination and reporting systems are required with clear communication channels through to local and national policy makers. This includes establishing, sustaining and recognising key roles and responsibilities required for maintaining centralized information and coordinating members and actions. A number of factors were associated with a loss of momentum during the pandemic including changes in roles, individual and organisational pressures on those involved in strategy development, the duration and emotional toll of the pandemic, ongoing uncertainty and challenges in longer-term planning, and a lack of clear output and coordination. This was articulated as resulting in more individual organisational action plans rather than a collective response.

Nevertheless, valuable learning was being drawn from within and beyond the city and shared with others through engagement with regional, national and UK-sector networks and coordinating bodies. 58% of organisational respondents to the survey reported representation on advisory groups, boards or committees, including local, regional and national groups. Here the value of shared learning coming into Dundee but also of Dundee sharing its knowledge with other cities was highlighted.

As a result of this ongoing interaction, the strategy was also understood to be locally focused but informed by the national picture. It was however suggested that the local perspective (and Dundee postcode requirements for inclusion) could be too restrictive and that the long-term strategy needs to be more inclusive of activity beyond the city, connecting with wider Regional Tayside agendas and actions (Tay City Deals). It was suggested this would enable a more issue-based approach rather than a location-based one. Clarity and consistency in geographical emphasis for future development agendas (i.e. city or regionally focussed) was however called for to support cultural organisations in contributing to wider initiatives.



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It was acknowledged that the Covid-19 pandemic presented a challenging and dynamic learning process for governments at all scales. In Dundee, it was noted that the cultural strategy was heavily connected with tourism and regeneration strategies. However, at the local level, critique was made of political support for culture in the city not being reflected in budgets. Many organisations reported experiencing funding cuts (local authority) and policy makers not understanding or seeing culture as a tool for recovery and collaboration. An emphasis on the “next big thing” and a degree of creative city “hype” (Brokalaki & Comunian, 2021) was also noted, with concerns raised over the sustainability of approaches that did not respond to significant talent retention and development challenges and issues around consistent access to space in the city that had been exacerbated by the pandemic. Instrumental use of artists as urban regenerators, particularly within the city centre, was also critiqued for lacking an appropriate valuing of creative workers and organisations or incentives to encourage making contributions to the city for wider benefit.

**“ It is imperative that action is taken to address the precarity of creative employment and that the contribution of cultural activity (including education, outreach and community engagement work) is fully recognised and supported.**

There are also ethical considerations in how culture is positioned as a tool for recovery, and in championing its ability to support health and wellbeing and to work with communities. In particular, caution was raised over the championing of artists’ “resilience” against adversity without trying to address the structural conditions that lead to precarity or even pitting them against organisations reliant on public funding seen to be less resilient. It is imperative that action is taken to address the precarity of creative employment and that the contribution of cultural activity (including education, outreach and community engagement work) is fully recognised and supported.

The wider political sphere was also seen to impact the local creative and cultural sector, associated with changes in leadership at local and national levels and the fluctuating position of culture in wider national strategy. Significant challenges were noted in building and maintaining relationships with policy makers, continuing to make the case for culture and needing to adapt to changing political agendas and measurement/impact interests (i.e. moving away from economic to health/wellbeing impacts).

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Overall, an ecological approach to the creative and cultural sector and policy making was called for. Rather than seeing cultural planning as a standalone practice, stakeholders highlighted the potential for strategic linkages between different policies and areas of the local plan – including hospitality, night-time economy and tourism as well as health and wellbeing and education agendas – in which the contribution of culture and cultural organisations could be recognised further. In adopting an ecological approach, it may also be advantageous for strategy development to go beyond the cultural sector and engage further with wider creative industries as well as their connections with other prominent industries in the city (ie. Biotech).

“ **Dundee policymakers and city were seen to have significant potential for doing things differently; by fostering the networks and capacity for ideas generation across a highly collaborative community and taking advantage of the city’s goldilocks scale.** ”

Leadership which considers this ecology, the challenges faced by the actors within it and how all the pieces fit together is also crucial to a sustainable recovery. Here Dundee policymakers and city were seen to have significant potential for doing things differently; by fostering the networks and capacity for ideas generation across a highly collaborative community and taking advantage of the city’s goldilocks scale.



# **Dundee Cultural Recovery: Recommendations for an ecosystem approach**

**As noted in the introduction, the pandemic has highlighted the value of adopting ecological approaches to understanding creative economies and cultural policy (Gross and Wilson, 2018) and the recovery process (Walmsley et al., 2021). The survey and the subsequent discussions with representatives of cultural organisations, members of the Cultural Development Group and creative freelancers reported on here also emphasised the interconnected nature of the impacts of the pandemic across the city and the actors within Dundee's creative and cultural sector.**

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1

**The first recommendation** is for cultural organisations, leaders and policy makers alike to **adopt an ecological perspective** – understanding and strengthening interrelationships and interdependencies between different actors and cultural resources and the opportunities they present – in designing and implementing recovery and long-term strategies. Such an approach would consider all parts of the Dundee creative ecosystem (policy, organisations, workers, communities/audiences and industries) as interconnected, and consider connections within and beyond sector and city boundaries, including strategic linkages with other areas of the local plan (i.e. hospitality and tourism, night-time economy, health and wellbeing and education). This would also encourage coordinated action across the city, taking advantage of the networked capacity of Dundee but also capitalising on the relative capacity of larger or more established organisations in the city to leverage support (including funding) that benefits the wider creative and cultural sector. It is also important to attend to existing and emerging power dynamics and consider where there may be greater resilience in some areas of the ecosystem than others (i.e. educational institutions compared to cultural organisations, and employees compared to freelancers), with an understanding that **insecurity in any area ultimately affects the strength of the whole.**

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2

**The second recommendation** is that emphasis be placed on **supporting creative workers (especially freelancers) as crucial members of the cultural and creative economy and its supply chain** who are often neglected. Persistent but often 'invisible' (Comunian & England, 2020) issues around precarious work and talent retention and development in the city need to be addressed and more equitable access to financial support provided for freelancers. This includes strengthening the support infrastructure for creative workers across the city (including existing professional networks) and addressing gaps in career development pathways (including paid work experience, internships and apprenticeships). It also involves cultural organisations establishing and developing more sustainable, inclusive and care-orientated practices and policies to support the cultural economy and its workforce. At the policy level, it requires an **understanding and valuing of cultural provision** and the energy and resources required to develop and sustain a flourishing cultural ecosystem whose work not only supports local employment and economic development but also connects with key agendas around education, community development and health and wellbeing. Here it is important to emphasise the integral importance of cultural engagement and outreach as part of "core business" and provide support to communicate the value such work brings both to organisations and wider cultural ecology of the city.

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“ this research has sought to highlight where there is hope and possibilities in Dundee that can be capitalised on to support a more sustainable, equitable and caring future for the cultural sector and wider creative economy.

**3** **The third recommendation** is that leaders of cultural organisations and policy makers **capitalise on the city's potential to innovate through collective action**. Dundee is well networked and has significant potential for a coordinated approach to recovery, including lobbying potential and adopting organisational practices and local policies that are more equitable and sustainable. To ensure that Dundee's creative and cultural sector (and the Cultural Development Group) can work together to be more than a sum of its parts, it is recommended that **consistent coordination and reporting systems** are developed for the Cultural Development Group. This includes developing longer-term research and data collection strategies and partnerships to be able to gather evidence from across the city on the longer-term impacts of the pandemic and sector needs. In order to continue to make the case for culture and ensure the sector is both accurately understood and valued in wider local and national policies, it is also important to **establish and sustain key communication** channels between Cultural Development Group members and policy makers.

While highlighting some of the dramatic impacts of the pandemic on cultural organisations and workers in Dundee, this research has also sought to highlight where there is hope (Gross, 2021) and possibilities (new and existing) in Dundee that can be capitalised on to support a more sustainable, equitable and caring (Gross, 2019) future for the cultural sector and wider creative economy. The recommendations above are therefore made with the aim of supporting the work of cultural organisations, sector leaders and policy makers in Dundee.

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