The New Lockdown: reopening attitudes amongst arts organisations in England

ARTQUEST

Survey and analysis: 17 August 2020

Introduction

In July 2020, as the UK Government recommended that arts and cultural organisations reopen at this stage in the COVID-19 / coronavirus pandemic while other devolved nations continued to suggest closure, Artquest conducted a targeted survey of arts organisations to understand their response. The survey opened on Monday 6 July and closed on Monday 27 July 2020.

We received 99 responses from across the UK, with almost all responses from England (36.4% from London). Since only four were received from Scotland, one from Wales, and none from Northern Ireland, we are focussing this report on **organisations in England only** and exclude these five non-England reports.

Artquest provides advice, information and projects for professional visual artists working in any media, anywhere in England. We also conduct research and intelligence gathering to support our programmes and the artists we work with. We are supported by regular funding from Arts Council England and are a programme of UAL. More information is on our website.

Summary

- Nationally from our sample, only **10.9% of respondents reopened on 4 July**, with **53.9% delaying reopening**. **2.4% do not expect to reopen again, with 1.9% already closed**.
    - In London, 12.5% of venues reopened, with 87.5% delaying
    - About a third (35.9% England, 29.4% London) of arts organisations reported that they do not have a gallery space, so are not supported by official reopening guidance at this time. No reopening safety Government guidance for studios, workshops, screenings or community-focussed workshops has been produced.
    - 2.9% of London respondents did not expect to reopen again, with 2% already closed.
- Respondents represent **362.5 FTE staff, with 251 FTE (69.2%) furloughed on the UK Government's Coronavirus Job Retention Scheme (JRS)**
    - London organisations represented 94 FTE staff with 64 FTE (68.1%) furloughed via JRS
    - Across the UK, official Government data reports that 75% of "Arts, entertainment, recreation and other services" organisations took part in the JRS, with 63% in London
- **37% of organisations had to use reserves during lockdown, with 18.5% relying on personal savings instead**

    - 34.3% of London organisations used organisational reserves, with a further 25.7% of respondents using their own personal savings
- While organisations trust the advice of peer organisations (17.9%) and international scientific institutions (16.7%) more than the UK Government or Arts Council England (ACE) (6.4% each), **most said they trusted their own research and opinions when considering reopening** (24.4%)
    - London organisations tend to trust their own opinions and research, international scientific institutions (23.1% each), peer organisations, and UK scientific sources (19.2% each). 7.7% report trusting the UK Government, with none reporting ACE as their most trusted source.

Recommendations and discussion

- Evidence suggests that **organisations with more reserves and a stable, regular income were more likely to reopen on 4 July**. These were also more likely to have had capacity to access both ERF and JRS. Smaller and more precarious organisations, those relying on ad hoc grant funding, were much less likely to reopen.
- There is an urgent need for **reopening guidance for non-gallery spaces**, and those with complex programmes involving other people. Health and safety during the pandemic must be incorporated more thoroughly into reopening plans, including risk assessments and improved safety practices.
- Related to this, as different UK nations open up at different speeds, **further reopening guidance risks being misunderstood or ignored as too complex**. This could be reflected in the low take-up of advice around safe reopening and measured by the low trust in official UK scientific or government sources.
- **Small-scale reopening access grants**, even if only small amounts, would both significantly help small organisations to reopen, and provide a useful guide to do so safely.
    - Guidance for artists working in participatory settings is already under discussion by ArtWorks Alliance.
- Lobbying landlords to provide **easier break-clauses in agreements** should circumstances change suddenly would enable those in precarious circumstances to try new programming and income generation without being tied into a long contract.
- There is **low reported trust in official sources of information**, with more organisations preferring to trust their own judgement over scientific evidence. This risks a fragmentary approach and further confusion about safety practices when reopening. As peer

organisations rank quite highly as trusted sources of information, this may be an effective way to distribute guidance.

- Significantly, the **additional stresses outside of the arts during lockdown** – changes to second- and third-jobs were often mentioned, particularly those in the arts which have also been affected by lockdown, and consequently more financial precarity – are having a predictable effect on small-scale arts organisations. Almost 15% of London respondents cite this as reason for not reopening, perhaps reflective of the higher costs associated with the capital. Comments were received about the reliance on host buildings and the need to repurpose larger gallery spaces as offices to enable social distancing.

Reopening: safety, decisions to reopen, and impact of reserves

- Respondents came from a variety of organisations including those in receipt of regular funds to those successful in occasional or rare public grants, with a fifth (20.2%) supported by small-scale commercial activity (fees for workshops, memberships, hires etc). Table 1 below shows this breakdown

Table 1 - *Please tell us about your regular income or funding: tell us where the majority of your income comes from* *(single-select, 90% response)*

Regularly funded	26.2%
Frequently grant funded	19.0%
Sometimes grant funded	15.5%
Mostly self-funded	19.0%
Mostly commercial activity / sales	**20.2%**

- Of those who did not reopen on 4 July, a further 13.8% expected to reopen by the end of July, and 83.3% of all respondents expect to have reopened by summer 2021. 12.6% of respondents did not know when they might reopen. Reopening plans in the next few months are as below.

Table 2 - *When do you except to reopen?* *(single-select, 94% response)*

Expected reopening period	**%age opening this period**	**Total cumulative %age to reopen by this period**
Reopened 4 July	10.9%	10.9%
July 2020	**13.8%**	24.7
August 2020	16.1%	40.8
September 2020	21.8%	62.6

October - December 2020	6.8%	69.4
January - June 2021	7.9%	**77.3%**
Don't know	**12.6%**	

- 1.9% have already permanently closed, with a further 2.3% not planning to reopen at all.
- Mapping reopening to responses on availability of reserves and how long they can be expected to last suggests most respondents plan to reopen well before these run out.

Table 3 - ***How long do you estimate your reserves / savings will last if you do not reopen?*** *(single select, 61% response)*

Reserves run out this period	
Reserves are already spent	24.6%
July 2020	3.5%
August 2020	3.5%
September 2020	15.8%
October – December 2020	19.3%
January – June 2021	33.1%

- As table 4 below suggests, **nearly 20% chose not to reopen because they do not believe it is safe to do so**, with **14.6% stating they do not believe that audiences are ready to return**. 14.3% of respondents in London indicated that their lives had been otherwise impacted by lockdown and they no longer had the time, energy or resources to reopen.
- All reasons for not reopening are outlined below.

Table 4 - ***Why did you not reopen on 4 July 2020?*** *(multi-select)*

Response	England	London
We do not believe it is safe to do so	**19.4%**	20.4%
We do not believe that general audiences would return	**14.6%**	20.4%
Lockdown has impacted other parts of my life and I do not have time / resources / energy	11.7%	**14.3%**
It is not possible to socially distance in our venue	8.7%	8.2%
We cannot afford the additional safety measures required	6.8%	6.1%
Reprogramming taking longer	5.8%	4.1%
Our audiences are mostly vulnerable / shielding	4.9%	4.1%
It is not possible to socially distance in the building where our venue is hosted	4.9%	2.0%
Funding we require is no longer available	4.9%	4.1%
Host building closed	3.9%	2.0%

- The 10.9% of respondents who reopened (table 2) implemented a number of safety measures (table 5), with 70% reporting completing a risk assessment, one of the key Government guidelines for reopening businesses.
- 90% rely on more frequent cleaning of frequently touched surfaces, key in UK Government guidance. Emerging research suggest person-to-person transmission is more likely than originally thought, and that better ventilation (60%), enforcing social distancing (60%) and requiring facemasks (40%) would be more effective in stopping the spread of COVID-19 / coronavirus.

Table 5 - ***Please describe the safety measures you have put in place before you reopened*** *(multi-select)*

Safety measure	**Of those reopening**
Increasing cleaning of frequently-touched surfaces and objects	**90%**
Undertook a risk assessment and shared with staff	**70%**
Posted signs and provided facilities for hand washing / hand sanitation	70%
Limited audience numbers	70%
Social distancing measurements on floors	**60%**
Maintaining better ventilation and opening windows	**60%**
Changed or limited opening times	60%
Required / provided audience face coverings / masks	**40%**
Rearrangement of internal walls to accommodate better social distancing	30%
Supported shielding workers and offering work from home	30%

- Only two respondents reported spending over £2,500 for safety measures (up to £4,000) as in table 6, indicating that even small additional sums could help many arts organisations to reopen. **Many interventions require behavioural change and do not cost much – for example, marking social distancing levels on floors**.

Table 6 - ***How much did you spend on additional safety measures to reopen?*** *(multi-select)*

Amount	**Number of measures taken (as list in table 4)**
£0-£100	8
£0-£100	7
£0-£100	6
£0-£100	4
£100-£500	5
£100-£500	3
£1000-£1500	3
£1500-£2000	7

Over £2500	8
Over £2500	7

Furlough scheme

- Respondents were asked whether they accessed the UK Government's Coronavirus Job Retention Scheme (JRS)
- **Only 26.9% of our respondents took part in JRS** (official Government data reports that 75% of Arts, "entertainment, recreation and other services" organisations took part in the scheme, a larger category that simply visual arts organisations) perhaps reflective of the type of organisation and income who responded.
- **Respondents who accessing the JRS claimed for 251 FTE out of 362.5 FTE people (62.9% of staff furloughed).** 19% of respondents who furloughed staff reopened on 4 July, with 15.8% of those who did not furlough staff reopening as in table 7.

Table 7 - reopening behaviour filtered via accessing Covid Job Retention Scheme

	Didn't reopen 4 July	**Reopened 4 July**
Accessed furlough scheme	81.0%	19.0%
Did not furlough staff	84.2%	15.8%

- Those that did not apply for the JRS stated that they were not eligible (42.6%), had only unpaid staff (19.7%), or that staff continued to work from home (32.8%) as in table 8. Clearly the JRS is not designed to support such small-scale organisations, as it intended only for those organisation paying staff via PAYE.

Table 8 - ***What was the main reason for not applying?*** *(single-select, 90% response rate)*

Reason for not applying	
We have not applied yet but plan to do so in future	1.6%
We applied but were not successful	0.0%
Our staff are not paid	19.7%
Our staff continued to work offsite	32.8%
Our organisation is not eligible for the scheme	42.6%
The application process is too difficult / bureaucratic	3.3%

Arts Council England Emergency Response Fund (ERF)

- The 38.5% of organisations and individuals in receipt of ERF in our sample received **£1.1m** (2.3% of total disbursed), with a success rate of 89.5% (ACE reported success rate 68.9% in visual arts / 64.5% overall). 61.6% of respondents did not apply.
- Overwhelmingly, those who did not apply for this support felt that they would be ineligible (60%), with other reasons shown in table 9.

Table 9 - *What was your main reason for not applying for Arts Council England's Emergency Funds?* *(single-select, 98% response)*

Response	
I do not apply for public funding	10.9%
I do not think I am eligible to apply	60.0%
So many people will be applying that it is not worth the effort	12.7%
The application process is too complicated	16.4%

- **Those in receipt of ERF were almost twice as likely to reopen on 4 July 2020**, with organisations (who are more likely to be in control of venue reopening) more likely to reopen than individually-supported projects.

Table 10 - reopening behaviour filtered via by successful application for ACE Funds

	Didn't reopen 4 July	Reopened 4 July
Received funding as an individual for a public project	85.7%	14.3%
Received funding as an organisation	73.7%	26.3%
Received any ACE emergency funding	76.9%	23.1%
Did not receive any ACE emergency funding	87.9%	12.1%

- Respondents in receipt of regular funding – examples given were Arts Council England National Portfolio, PHF Explore & Test or More & Better, or local council funding – and those receiving frequent grants were more likely to have got both ERF and to have taken part in JRS. While a legal organisational structure with employees is required to take part in the JRS, ERF had a strand open to individuals as well.

Table 11 – respondent income type and success in ERF and JRS

	Received ERF	**Received JRS**	**Received ERF and JRS**	**Received neither**
Regularly funded	5	11	5	0
Frequently grant funded	11	5	4	0

Sometimes grant funded	8	0	0	1
Mostly self-funded	2	3	2	1
Mostly commercial activity / sales	6	3	1	1
Complex income mix	1	1	0	0

Income sources and reopening

- **Those reliant on commercial income were most likely to reopen on 4 July (57.1%), while those in receipt of irregular grants reporting not reopening at all (0%)**.

Table 12 – respondent funding sources filtered via opening behaviour

Funding sources	Did not reopen 4 July	Reopened 4 July
Regularly funded	93.3%	6.7%
Frequently grant funded	75.0%	25.0%
Sometimes grant funded	100.0%	0.0%
Mostly self-funded	81.8%	18.2%
Mostly commercial activity / sales	42.9%	57.1%
Complex income mix	100.0%	0.0%

- These results could suggest that **commercial imperatives overrule safety concerns when considering early reopening**, while those who get regular income are able to delay. Infrequent grant recipients could perhaps lack the resources to make applications at this time.
- Regularly funded organisations – who were more likely to receive ERF and take part in JRS – would be able to delay reopening more comfortably than those reliant on commercial income.

Trust and reopening behaviour

- The survey asked respondents who they most trust when considering options to reopen. **Respondents trust the advice and actions of their peers (18.2%) and international scientific institutions (15.6%) more than the UK Government or ACE (6.5% each).** However, most respondents said they are making choices based on their own research and opinions when considering reopening (24.7%), perhaps reflective of the general reopening guidance provided officially requiring organisations to come up with individual plans.

Table 13 - *Who do you most trust when considering whether or not to reopen?* *(single-select, 83% response)*

My own opinion based on sources I gathered myself	24.7%
The opinions of my peers / other similar organisations	18.2%
UK Government advice	6.5%
Arts Council England advice	6.5%
Scientific advice from UK sources	11.7%
Scientific advice from international sources (EU, World Health Organisation etc)	15.6%
A combination of the above	9.1%
Internal organisation	2.6%
Other UK devolved administrations and local councils	3.9%
Community consultation	1.3%

- Mapping this against reopening on 4 July allows us to see what sources are trusted by those who reopened, and those sources trusted by people who chose not to reopen, as in table 14.

Table 14 - *Who do you most trust when considering whether or not to reopen?* *(single-select, 83% response)* filtered via ***Did you reopen on 4 July 2020?*** *(single select, 99% response)*

Trusted sources against reopening behaviour	Didn't reopen	Reopened
My own opinion based on sources I gathered myself	22.9%	37.5%
The opinions of my peers / other similar organisations	22.9%	12.5%
UK Government advice	0.0%	25.0%
Arts Council England advice	11.4%	0.0%
Scientific advice from UK sources	8.6%	25.0%
Scientific advice from international sources (EU, World Health Organisation etc)	22.9%	0.0%
Other	11.4%	0.0%
Total	*100.0%*	*100.0%*

- Those reporting **trust in their own opinions (37.5%), or those of UK sources of information (25%), were significantly more likely to reopen on 4 July**, as per Government guidance, than those trusting international sources (22.9%).
- Those who **most trusted international scientific sources and their peer organisations were most likely to feel that reopening was unsafe**, while those most trusting of UK scientific sources, the UK Government and ACE tended to believe that reopening was safe.

Table 15 - trusted sources filtered via expected reopening period (%)

	Permanently closed	July 2020	August 2020	Sept 2020	Don't know
My own opinion based on sources I gathered myself	1.5%	1.5%	4.5%	4.5%	4.5%
The opinions of my peers / other similar organisations	0.0%	1.5%	3.0%	4.5%	4.5%
UK Government advice	0.0%	0.0%	0.0%	0.0%	1.5%
Arts Council England advice	0.0%	1.5%	3.0%	1.5%	0.0%
Scientific advice from UK sources	0.0%	3.0%	1.5%	1.5%	0.0%
Scientific advice from international sources	1.5%	1.5%	3.0%	6.0%	1.5%

- Respondents who report **most trust in their own opinions or those of their peers were also more likely to plan to reopen in August or September**, with similar numbers reporting they do not know when they would reopen. This may point to a lack of clarity from sources of information making the question of reopening more confusing for those with low trust in official sources of information.
- **People trusting international scientific sources are most likely to reopen in September 2020**, delaying reopening longer than those with trust in UK scientific sources (who are more likely to indicate reopening in July).
- As our sample size for this cross-reference is small (n=43) more research would be required to verify the impact of trusted sources on reopening behaviour.

Appendix 1: Distribution

Survey was promoted via partners, an Artquest email newsletter to our 3,000 subscribers (6 July 2020), individual contacts (c. 400 individuals) and our own social networks. Partners promoting the survey included:

- Engage, *9 July E-Bulletin*
- a-n members bulletin, July 2020
- Mayor of London's office, *Culture news from City Hall newsletter*, 24 July 2020
- CVAN, *Sector News July*, 24 July 2020
- UK Hackspace Foundation, *Telegram group*, 24 July

Appendix 2: Questions and responses

1. Where in the UK are you based?		
Please select	4	4.3%
East of England	3	3.2%
East Midlands	4	4.3%
London	35	37.6%
North East	1	1.1%
North West	8	8.6%
South East	20	21.5%
South West	11	11.8%
West Midlands	5	5.4%
Yorkshire and Humber	2	2.2%
Northern Ireland	0	0.0%
Scotland	0	0.0%
Wales	0	0.0%
TOTAL	***93***	***100.0%***

1b. In which London borough are you based? [For those responding LONDON at 1]		
Please select	4	11.4%
Barking	1	2.9%
Barnet	0	0.0%
Bexley	0	0.0%
Brent	0	0.0%
Bromley	0	0.0%
Camden	2	5.7%
Croydon	1	2.9%
Ealing	0	0.0%
Enfield	0	0.0%
Greenwich	2	5.7%
Hackney	2	5.7%
Hammersmith	0	0.0%
Haringey	1	2.9%
Harrow	1	2.9%

Havering	1	2.9%
Hillingdon	0	0.0%
Hounslow	0	0.0%
Islington	2	5.7%
Kensington and Chelsea	2	5.7%
Kingston upon Thames	0	0.0%
Lambeth	2	5.7%
Lewisham	0	0.0%
Merton	0	0.0%
Newham	0	0.0%
Redbridge	1	2.9%
Richmond upon Thames	0	0.0%
Southwark	10	28.6%
Sutton	0	0.0%
Tower Hamlets	2	5.7%
Wandsworth	0	0.0%
Westminster	1	2.9%
Waltham Forest	0	0.0%
TOTAL	***35***	***100.0%***

2. Please indicate the type of organisation you represent Tell us about your main programme elements - select all that apply		
Gallery	44	23.2%
Studios	35	18.4%
Live events, e.g. talks, screenings, exhibition openings etc	33	17.4%
Events and workshops aimed at your local community	50	26.3%
Other	28	14.7%
TOTAL	***190***	***100.0%***
Multi select		

3. Please tell us about your regular income or funding Tell us where the majority of your income comes from - you can only select one option, or indicate if none of these apply		
We receive regular public funding (e.g. Arts Council England National Portfolio, PHF Explore & Test or More & Better, local council funding etc)	22	26.2%

We frequently get grants for specific projects (e.g. Arts Council England Project Grants, one-off support from trusts and foundations etc)	16	19.0%
We sometimes get grants for specific projects (as above)	13	15.5%
We are mostly self-funded by the people who work with us	16	19.0%
We are mostly supported by commercial activity / sales	17	20.2%
Private income	3	3.6%
HEI venue	1	1.2%
None of these describe our income mix	3	3.6%
TOTAL	***84***	
% response	*90%*	

4. Have you applied for Arts Council England Emergency Funds?		
No	56	60.2%
Yes, as an individual in support of a public project	14	15.1%
Yes, as an organisation	23	24.7%
TOTAL	***93***	***100.0%***
% response	*100%*	

4b. What was your main reason for not applying for Arts Council England's Emergency Funds? [for those responding NO at 4]		
I do not apply for public funding	6	10.9%
I do not think I am eligible to apply	33	60.0%
So many people will be applying that it is not worth the effort	7	12.7%
The application process is too complicated	9	16.4%
TOTAL	***55***	***100.0%***
% response (to No)	*98%*	

4c. Was your application successful? [for those responding YES at 4]		
Yes	33	89.2%
No	4	10.8%
TOTAL	***37***	***100.0%***
% response (to Yes)	*100%*	

4d. Please tell us the amount you received from Arts Council England Emergency Funds [for those responding YES at 4]	
Total	£ 1,079,064

5. Have you used organisational reserves or savings to continue covering the costs of your organisation during lockdown? Please only tell us about the reserves or savings you have used to cover costs of your organisation, not your personal costs		
Yes, I have used my personal savings	17	18.5%
Yes, we have used organisational reserves	34	37.0%
No, we do not have organisational reserves or personal savings	15	16.3%
No, we have not needed to use either organisational reserves or personal savings	26	28.3%
TOTAL	***92***	***100.0%***
% response	*99%*	

6. Have you furloughed any staff as part of the UK Government's Coronavirus Job Retention Scheme? Please tell us if you have staff who have been furloughed		
Yes	25	26.9%
No	68	73.1%
TOTAL	***93***	***100.0%***
% response	*100%*	

6b. What was the main reason for not applying? [for those responding NO at 6]		
We have not applied yet but plan to do so in future	1	1.6%
We applied but were not successful	0	0.0%
Our staff are not paid	12	19.7%
Our staff continued to work offsite	20	32.8%
Our organisation is not eligible for the scheme	26	42.6%
The application process is too difficult / bureaucratic	2	3.3%
TOTAL	***61***	***100.0%***

% response (to No)	*90%*	

7. Please tell us how many staff you have in total	362.5 FTE	**8. Please tell us how many staff you furloughed**	251 FTE
%age staff furloughed			*69.2%*

8. Current UK Government guidance is that museums and galleries can reopen on 4 July 2020 with social distancing and other safety measures in place. Did you reopen your venue on 4 July 2020?		
Yes	10	10.9%
No	49	53.3%
This guidance does not apply to us as we do not have a gallery space	33	35.9%
TOTAL	***92***	***100.0%***
% response	*99%*	

8b. Please describe the safety measures you have put in place before you reopened [for those responding YES at 8]		
Undertook a risk assessment and shared with staff	8	80.0%
Social distancing measurements on floors	7	70.0%
Posted signs and provided facilities for hand washing / hand sanitation	8	80.0%
Required / provided audience face coverings / masks	5	50.0%
Maintaining better ventilation and opening windows	7	70.0%
Supported shielding workers and offering work from home	3	30.0%
Increasing cleaning of frequently-touched surfaces and objects	10	100.0 %
Limited audience numbers	8	80.0%
Changed or limited opening times	7	70.0%
Rearrangement of internal walls to accommodate better social distancing	4	40.0%
Other	**2**	20.0%
TOTAL	***69***	
Multi select		

8c. How much did you spend on additional safety measures to reopen?
Please indicate approximately how much you had to spend on your safety measures above

[for those responding YES at 8]		
£0-£100	4	40.0%
£100-£500	2	20.0%
£500-£1000	0	0.0%
£1000-£1500	1	10.0%
£1500-£2000	1	10.0%
£2000-£2500	0	0.0%
Over £2500	2	20.0%
TOTAL	***10***	
Other (amount)	**£ 4,000**	

8d. Why did you not reopen on 4 July 2020? Select all that apply [for those responding NO at 8]		
We opened after 4 July 2020 / are now open	13	12.6%
Our organisation has already permanently closed as a result of lockdown	2	1.9%
We do not believe it is safe to do so	20	19.4%
We cannot afford the additional safety measures required	7	6.8%
We do not believe that general audiences would return	15	14.6%
Our audiences are mostly vulnerable / sheilding	5	4.9%
It is not possible to socially distance in our venue	9	8.7%
It is not possible to socially distance in the building where our venue is hosted	5	4.9%
Funding we require is no longer available	5	4.9%
Lockdown has impacted other parts of my life and I do not have time / resources / energy	12	11.7%
Host building closed	4	3.9%
Reprogramming taking longer	6	5.8%
TOTAL	***103***	***100.0%***
Multi select		

8e. When do you except to reopen? Based on your position today, when is the earliest that you could reopen your venue? [for those responding NO at 8]		
Please select	16	18.4%

We do not expect to reopen or have already permanently closed	2	2.3%
end of July 2020	12	13.8%
end of August 2020	14	16.1%
end of September 2020	19	21.8%
end of October 2020	5	5.7%
end of November 2020	0	0.0%
end of December 2020	1	1.1%
end of January 2021	2	2.3%
end of February 2021	1	1.1%
end of March 2021	1	1.1%
end of April 2021	2	2.3%
end of May 2021	1	1.1%
end of June 2021	0	0.0%
Don't know	11	12.6%
TOTAL	***87***	***100.0%***
% response	*94%*	

8f. How long do you estimate your reserves / savings will last if you do not reopen? Based on your financial position today, how long can you maintain your organisation without reopening? [for those responding NO at 8]		
Please select	25	30.5%
Our reserves are already spent	14	17.1%
end of July 2020	2	2.4%
end of August 2020	2	2.4%
end of September 2020	9	11.0%
end of October 2020	2	2.4%
end of November 2020	1	1.2%
end of December 2020	8	9.8%
end of January 2021	2	2.4%
end of February 2021	1	1.2%
end of March 2021	6	7.3%
end of April 2021	0	0.0%
end of May 2021	1	1.2%
end of June 2021	9	11.0%

TOTAL	***82***	***100.0%***
% response	*88%*	

9. Who do you most trust when considering whether or not to reopen?		
My own opinion based on sources I gathered myself	19	24.7%
The opinions of my peers / other similar organisations	14	18.2%
UK Government advice	5	6.5%
Arts Council England advice	5	6.5%
Scientific advice from UK sources	9	11.7%
Scientific advice from international sources (EU, World Health Organisation etc)	12	15.6%
A combination of the above	7	9.1%
Internal organisation	2	2.6%
Other UK devolved administrations and local councils	3	3.9%
Community consultation	1	1.3%
TOTAL	***77***	***100.0%***
% response	*83%*	

Appendix 3: Other comments

The survey allowed respondents to add any other information they thought relevant which had not been asked. These tended to suggest that individual organisations faced multiple and complex problems when deciding to reopen, caused by buildings, more sophisticated programming, concerns about audiences, and staff welfare. Indicative comments are below.

Programme

- As a multidisciplinary organisation different aspects of our programme have reopened at different times and with different policies. Our studios reopened at the beginning of July (as our main source of earned income), but we did not yet believe we could safely reopen to the public. As of 29 July we will reopen the gallery, with a 2-in 2-out & mask policy, but we will still not be hosting workshops (a major part of our programme) for the foreseeable future, as we do not believe it safe especially as a considerable number of those we support, and some of our team, are vulnerable and/or shielding.
- We have postponed our entire education and public outreach programme. This was a very practical programme that would be impossible to put online. Our current space can't facilitate socially distant working, and our programme sometimes requires group and collaborate working.
- The question of how have organisation's programmes and ambitions changed to accommodate this 'new normal' should have been addressed in the survey. It would be interesting to see how different artist led organisations have coped after lockdown.
- We are continuing to follow Government guidance to work at home is possible and are not planning to return to working in our office before September 2020 at the earliest. Our cashflow is secure until the end of the financial year but the picture becomes less clear after that. We maybe in a position where we have to draw on our reserves 2021/22, this is dependent on being able to raise money from other sources, including maintaining relationships with existing funders. So, in short, okay for now but the future is far from certain.

Buildings

- A question for the future - do we really need arts venues or should we be taking what we do directly out into our communities?
- We are based within a [larger building] and could only open conditional to their umbrella policies, not just our own. Even if we had thought it acceptable to keep our studios open during lockdown, we would not have been able to access them with the closure of the [host building].
- We have had to repurpose the gallery as an administrative office in order to maintain social distance.
- We have a small office space but use other venues for activities - our income is not dependant on the venue itself.
- Our financial situation is not based on re-opening for our artistic programme, but for venue hire which provides a major contribution to our annual income. Until people can mingle in groups of 70-100 we do not have a venue hire offer.
- As a small organisation with free entry policy it is financially better to stay closed as opening has additional costs (PPE, cleaning, extra staff etc) not covered by lost income.
- We made an early decision not to have a venue or require people to come to us, [which] has turned out to be a good decision for resilience.
- We are an artists' studios provider with a Project Space which is open to the public. The PS does not generate income. The bulk of our income is from studio rents which have, largely speaking, not been affected by lockdown because of the Government's Small Business Rates Relief Grants. We are keeping the PS closed because we attract very few passing visitors, but our exhibition openings can be crowded. Therefore it is not safe to reopen for the foreseeable future, although this represents no loss of income for us as we take no commission on sales.
- Essentially it will cost about £15,000 in capital outlay to open - which we do have but the real problem is that we are on a rolling years lease in a G2 listed building - the rateable value of our building combined with our lack of security of tenure means we don't qualify for any of the Gov funding - central or local - so we have to generate all our own income through revenue. Measures that ensure 'keeping clean and safe' will increase our fixed overheads by 20, and social distancing means our income will be cut by 50%.
- We reopened, as a craft gallery/retail shop with [other] non-essential retailers after 15th June although we are based within an Arts Centre that has still not opened so access for our customers is restricted.

- We don't feel that we've been given sufficient guidance with regards to opening up multi-occupancy spaces so we're having to use our best judgement and guidance from art venues in Melbourne, who seem to have a great, well thought out system in place.
- We managed to stay open throughout the Covid-19 pandemic. With staff avoiding public transport, strict social distancing, and staggered breaks we have managed to produce frames throughout without a hint of Covid-19 entering the workshop!

Audience confidence

- Projects are on hold and people will not turn out to participate till a solution comes.
- Concerned about safety for staff, particularly front of house. Whether audiences will actually want to visit. Some staff moved out of London for the time being.
- Audience surveys suggest only 1/3 of people are comfortable with indoor activities at the moment.
- We opened the studios for artist members only with strict Covid procedures. The gallery remains closed. We basically don't trust the general public as the majority of our management are high risk.

Safety concerns

- The complete lack of PPE, or the current extortionate PPE prices, means that we are unable to fulfil many of our processes here at the studios.
- The team have mixed views on returning to work - this is something that we need to listen to. Some live with elderly relatives or have health issues. Travel issues for those who live further away are a factor.
- We are not venue based but work in partnership with many event organisers and others who are. There is no general consensus on what is safe practice and many of our partners are still closed and/or cancelling evens well into autumn. Some will not stage public events again until next year.

Income and support

- We are a small co-op that operates as a shared studio and runs workshops and public events, we often work with partner organisations and local homeless charities/ refuges on specific projects. The size of the space and the fact that viruses can live for a long time on clay means it will be difficult for us to re-open at the moment.

- We have fortunately been able to secure some funding from [our local] Council which will cover our costs until next spring, we are planning a studio sale (via click and collect/Instagram) later in the summer to raise additional funds and support individual co-op members. Because we are self-funded as a Co-op and often sustain ourselves through running workshops/ summer school Covid-19 has really impacted our ability to earn income.
- We charge for the hire of the gallery for exhibitions and have drastically reduced the already-low rate to make it easier on exhibitors, to £10p/w which just about covers a volunteer giving the place a clean between people.
- We got a small business rates relief grant of £10k as our warehouse space is registered for small business rates relief. We also had a 3rd [one third] reduction in our rent for the period of lockdown. We lost revenue by having to close workshops to paying members of the public but we have a core group of 10 artists that continued to cover rent with monthly membership fees.
- We have had to rethink future plans especially around how we might operate sustainably. This is still a big unknown.
- Our charity received a government small Covid business grant through our local council which is helping us.
- Some art venues are small and privately run by solo artists working on their own with no staff. We are not all gigantic galleries, it's these small galleries who pre-covid would be supporting many other solo freelance artists that are near totally ignored.
- Because I’m a rate paying business the local council has given me a grant that has eased the financial pressure of running a studio. Weirdly, I’m selling more work than ever on line.
- We are also publicly funded through a local authority, so instead of furlough our staff were also expected to work on the community response and roles were repurposed.
- We rely on income from desk and studio rental. At the start of lockdown we gave everyone a 6 month payment holiday. We have benefitted from a SME grant administrated by the local council.
- We applied for local business support and the ACE emergency fund - this has enabled us to subsidise all studio rents to enable studio holders to continue. We have also created a small fund for those in need of 100% relief. Doing this has eradicated our reserves but means that we're stable until December/January and anticipate creating a small cushion over the next two months.

- We usually partner with other venues or sites so our programming and potential for raising funds has been severely impacted. We can stay dormant for a while and work unpaid, or though the support of individual funds as freelancers to keep projects in play wherever possible.

Applying to ACE ERF

- We didn't apply for Emergency Funding as we have an endowment fund, and so are essentially not eligible.
- [Our main reason for not applying to ERF] is that we considered that other organisations were in a worse situation than us and therefore needed it more than us.
- We chose not to apply for ACE emergency funds at this time as we will need more support as the pandemic and it's true costs impact on local authority finances.
- The bigger trend of the London non commercial/non-funded art scene (ie run by artists/volunteers) having already weakened over the years - and being further erased by ACE only providing support to those who previously had received it.

Appendix 4: Demographic data of respondents

49 responses (49%) were received on a separate form asking for demographic and social background data. Responses on this form cannot be traced to individual responses on the main survey.

Gender identity		
Female (including trans women)	31	63%
Male (including trans men)	14	29%
Non-binary	1	2%
Prefer not to say	3	6%

Is your gender identity different to the sex you were assigned to be at birth?		
Yes	7	14%
No	40	82%
Prefer not to say	2	4%

Age		
0-19	0	0%
20-34	10	20%
35-49	16	33%
50-64	20	41%
65-79	2	4%
80+	0	0%
Prefer not to say	0	0%

Sexual orientation		
Bisexual	3	6%
Gay Man	6	12%
Gay Woman/Lesbian	2	4%
Heterosexual/Straight	31	63%
Queer	0	0%
Prefer not to say	6	12%

Ethnicity		
White British	35	71%

White Irish	1	2%
Gypsy or Irish Traveller	0	0%
Any other White background	8	16%
White & Black Caribbean	0	0%
White & Black African	0	0%
White & Asian	0	0%
Any other Mixed background	2	4%
Indian	1	2%
Pakistani	0	0%
Bangladeshi	0	0%
Chinese	0	0%
Any other Asian background	0	0%
Black African	0	0%
Black Caribbean	0	0%
Any other Black background	0	0%
Arab	0	0%
Any other ethnic group	2	4%
Prefer not to say	0	0%

Disability and / or impairment		
Identify as a deaf or disabled person, or have a long term health condition	6	12%
Non-Disabled	40	82%
Prefer not to say	2	4%

Were you in the first generation of your family to attend a higher education institution?		
Yes	26	53%
No	21	43%
I did not attend a higher education institution	1	2%

Did you study at art school?		
Yes	31	63%
No	18	37%

What is your highest qualification?

No formal qualifications	0	0%
Secondary School level	1	2%
ESOL/ Literacy qualifications	0	0%
Further education (AS, A level, Diploma or NVQ level 2/3)	2	4%
Higher education (Graduate)	21	43%
Higher education (Postgraduate and Doctorate)	25	51%
Vocational training	0	0%
Prefer not to say	0	0%

What type of school did you go to?		
A state-run or -funded school – non-selective	37	76%
A state-run or -funded school – selective	3	6%
Independent/fee paying school	4	8%
Independent/fee paying school on a scholarship	3	6%
Prefer not to say	1	2%

What was the highest level of academic qualification of your parents/care givers?		
No formal qualifications	11	22%
Secondary School level	3	6%
ESOL/ Literacy qualifications	0	0%
Further education (AS, A level, Diploma or NVQ level 2/3)	9	18%
Higher education (Graduate)	13	27%
Higher education (Postgraduate and Doctorate)	6	12%
Vocational training	4	8%
Prefer not to say	1	2%

Please think about your parent(s) or other primary caregiver when you were around 14 years old. What kind of work did this parent/caregiver do?		
Long term unemployed	1	2%
Short term unemployed	0	0%
Routine manual and service occupations e.g. van driver, cleaner, porter, waiter/waitress, bar staff	4	8%
Semi-routine manual and service occupations e.g. postal worker, security guard, machine worker, receptionist, sales assistant	1	2%
Technical and craft occupations e.g. fitter, plumber, printer, electrician	9	18%

Clerical and intermediate occupations e.g. secretary, nursery nurse, office clerk, call centre agent	4	8%
Middle or junior managers e.g. office manager, warehouse manager, restaurant manager	2	4%
Modern professional occupations e.g. teacher, nurse, social worker, artist, musician, software designer	10	20%
Traditional professional occupations e.g. accountant, solicitor, scientist, medical practitioner	7	14%
Senior managers and administrators e.g. finance manager, chief executive, director	5	10%
Retired	0	0%
Not applicable	2	4%
Don't know	0	0%
Prefer not to say	3	6%